

**Appendix A: MTC Resolution 3726 Revised:  
Lifeline Transportation Program Guidelines**

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Date: December 21, 2005  
W.I.: 1311  
Referred by: PAC  
Revised: 01/25/06-C

ABSTRACT

Resolution No. 3726, Revised

This Resolution adopts the program guidelines for MTC's Lifeline Transportation Program.  
This Resolution supersedes MTC Resolution No. 3699.

The following attachment is provided with this Resolution:

Attachment A— Lifeline Transportation Program Guidelines

This resolution was revised on January 25, 2006 to amend Attachment A.

Further discussion of this Lifeline Guidelines is contained in the MTC Executive Director's Memorandum to the Programming and Allocations Committee dated December 14, 2005 and the Programming & Allocations Committee Summary Sheet dated January 11, 2006.

Date: December 21, 2005  
W.I.: 1311  
Referred by: PAC

RE: Lifeline Transportation Program Guidelines

METROPOLITAN TRANSPORTATION COMMISSION  
RESOLUTION NO. NO. 3726

WHEREAS, the Metropolitan Transportation Commission (MTC) is the regional transportation agency for the San Francisco Bay Area pursuant to Government Code Section 66500 *et seq.*; and

WHEREAS, MTC adopted the Transportation 2030 Plan (MTC Resolution 3681), which seeks up to \$216 million in new revenues over the plan's twenty-five year horizon to address mobility needs for residents of low-income communities; and

WHEREAS, these new revenues are not readily available; and

WHEREAS, alternative sources of funds have been identified as referenced in Attachment A of this Resolution to provide services for a three year interim period of time beginning in Fiscal Year 2005-06; and

WHEREAS, MTC has developed program guidelines to be used for the funding and oversight of the Lifeline Transportation Program for projects to be funded for this three year period beginning in Fiscal Year 2005-06 as set forth in Attachment A of this Resolution attached hereto and incorporated herein as though set forth at length; and

WHEREAS, MTC will use the process and criteria set forth in Attachment A of this Resolution to fund a program of projects for the Lifeline Transportation Program for Fiscal Year 2005-06 through Fiscal Year 2007-08; now, therefore be it

RESOLVED, that MTC approves the program guidelines to be used in the administration and selection of Lifeline Transportation projects, as set forth in Attachment A of this Resolution; and be it further

RESOLVED, that the Executive Director shall forward a copy of this Resolution, and such other information as may be required, to such other agencies as may be appropriate; and be it further

RESOLVED, that this Resolution supersedes MTC Resolution No. 3699.

METROPOLITAN TRANSPORTATION COMMISSION

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Jon Rubin, Chair

The above Resolution was entered into by the  
Metropolitan Transportation Commission  
at a regular meeting of the Commission held in  
Oakland, California on December 21, 2005.

Date: December 21, 2005  
W.I.: 1311  
Referred by: PAC  
Revised: 01/25/06-C

Attachment A  
MTC Resolution No. 3726  
Page 1 of 5

## **Lifeline Transportation Program Guideline**

### **GUIDING PRINCIPLES FOR COUNTY LIFELINE PROGRAMS FY 2005-06 through FY 2007-08**

Program Goals: The county programs are established to fund projects that result in improved mobility for low-income residents of the nine San Francisco Bay Area counties, and are expected to carry out the following regional Lifeline Program goals:

The Lifeline Program supports community-based transportation projects that:

- Are developed through a collaborative and inclusive planning process that includes broad partnerships among a variety of stakeholders such as public agencies, transit operators, community-based organizations and other community stakeholders, and outreach to underrepresented stakeholders.
- Address transportation gaps and/or barriers identified through a Community-Based Transportation Plan (CBTP), countywide or regional Welfare-to-Work Transportation Plan, or are otherwise based on a documented assessment of needs within the designated communities of concern. Findings emerging from one or more CBTPs may also be applied to other low-income areas, or otherwise be directed to serve low-income constituencies within the county, as applicable.
- Improve a range of transportation choices by adding a variety of new or expanded services including but not limited to: enhanced fixed route transit services, shuttles, children's programs, taxi voucher programs, improved access to autos, capital improvement projects. Transportation needs specific to elderly and disabled residents of low-income communities may also be considered when funding projects.

Program Administration: MTC recommends the Lifeline Program be administered by the Congestion Management Agencies (CMAs)<sup>1</sup> for a minimum of three years (FY 2005-06 through

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<sup>1</sup> Alameda County Congestion Management Agency  
Contra Costa County Congestion Management Agency  
San Francisco County Transportation Authority  
Marin County TAM  
Napa County Transportation Planning Agency  
San Mateo City-County Association of Governments  
Santa Clara Valley Transportation Authority  
Sonoma County Transportation Authority

FY 2007-08). At a CMA's discretion, and with concurrence by MTC, a countywide entity other than or in addition to the CMA may administer the program. That entity must either be an eligible recipient of respective Lifeline Transportation fund sources, or capable of serving as fiscal agent to administer program funds, and otherwise meet program expectations as described in these program guidelines. In Santa Clara County, the county and the Valley Transportation Authority (VTA) will enter into a joint agreement for administration of the Lifeline Program.

MTC requests receipt of written documentation no later than September 30, 2005 from the CMA governing board either agreeing to the terms outlined in the guidelines for administering the program, or identification of stakeholders and partners representing non-transit constituencies such as county social service agencies and community based organizations recommended to administer the program in lieu of the CMA. That countywide entity will likewise submit notification to MTC of its interest and willingness to administer the program consistent with these guidelines, for the Commission's consideration and approval. Absent this documentation, MTC will hold the county's lifeline funding in reserve until such time a local agreement is reached.

Prior to completion of the three-year period MTC, in consultation with CMAs or other project administrators and other program stakeholders, will conduct an evaluation to assess program results, and to recommend a long-term strategy for administration of the Lifeline Program.

All interim lifeline funds will be available for direct services, and not used to cover costs that may be incurred by the CMAs or other countywide agency in administering this program.

Multi-Year Programming: MTC staff recommends that a one-time multi-year programming cycle will be conducted to select eligible lifeline transportation projects. At a county's discretion, however, that county's Lifeline Transportation funds may be reserved for future programming.

Competitive Process: For the county programs, funds must not be allocated by formula to sub-areas within the county. Projects must be selected consistent with the findings of a CBTP, countywide regional welfare-to-work plan or other documented assessment of needs within the designated communities of concern. Where plans have not been completed, projects will be selected through an open, competitive process in order to fund those projects that best exemplify the program principles and result in the greatest community benefit.

Grant Application: To ensure a streamlined application process for sponsors, a universal application form (or standard format and content for project proposals) will be developed jointly by MTC and CMA staff, but may be modified as appropriate by the CMAs or countywide administering agency for inclusion of county-specific grant requirements. The "call for projects" for the county programs should be coordinated as closely as possible.

Program Match: A local match of a minimum of 20% of the total program cost is required; new Lifeline Transportation Program funds may cover a maximum of 80% of the total project cost.

Project sponsors may use other local funding sources (Transportation Development Act, operator controlled State Transit Assistance, local sales tax revenue, etc.) to meet the minimum 20% matching fund requirement. In addition, the required match can include other *non*-Department of Transportation (DOT) federal funds. Eligible sources of non-DOT federal funds include: Temporary Assistance to Needy Families (TANF), Community Services Block Grants (CSBG) and Social Services Block Grants (SSBG) administered by the US Department of Health and Human Services, Community Development Block grants (CDBG) and HOPE VI grants administered by the US Department of Housing and Urban Development (HUD). Grant funds from private foundations may also be used to meet the match requirement, and in-kind costs associated with oversight of the project may also be considered to meet the match requirement.

Evaluation Criteria: Standard evaluation criteria will be jointly developed by MTC and CMA (or other countywide administering agency) staff for use in selecting projects. Additional criteria may be added to the county program but should not replace or supplant the regional criteria. Each county will appoint local representatives representing a range of stakeholders to score and select projects, and each county will assign local priorities for project selection. MTC staff will review the proposed county program criteria to ensure consistency and to facilitate coordination among county programs.

Project Selection/Draft Program of Projects: The CMAs (or other countywide administering agency) shall provide an opportunity for outside interests and organizations (e.g., local department of social services, transit agencies and other transportation service providers, local community-based organizations, etc.) to assist in developing and/or to comment on a proposed list of projects to fund. A list of participants in the CBTP processes or other prior lifeline related activities will be provided to the project administrator for their consideration.

In funding projects, preference will be given to strategies emerging from the local CBTP process, if completed, or from a countywide regional welfare-to-work or other documented assessment of need within the designated communities of concern. Regional lifeline funds should not supplant or replace existing sources of funds. Lifeline funds may be used for either capital or operating purposes. Eligible operating projects, consistent with requirements of funding sources, may include (but are not necessarily limited to) new or enhanced fixed route transit services, restoration of lifeline-related transit services eliminated due to budget shortfalls, shuttles, children's programs, taxi voucher programs, improved access to autos, etc. Inter-county projects may also be funded, if two or more counties wish to jointly plan for and fund such a project. CMA or countywide administering agency will consider the project sponsor's ability to sustain ongoing funding beyond the initial grant funding.

Capital projects that do not require ongoing funding are encouraged. Examples of eligible capital projects include (but are not necessarily limited to) purchase of vehicles, provision of bus shelters, benches, lighting, sidewalk improvements or other enhancements to improve transportation access for residents of low-income communities.

Transportation needs specific to elderly and disabled residents of low-income communities may also be considered when funding new programs.

Funding: Fund sources available for the interim 3-year funding period include CMAQ, JARC and STA funds, as shown in Table A. Funding amounts will be assigned to each county, based on that county's share of poverty population, consistent with the estimated distribution outlined in Table A. MTC will confirm project/applicant eligibility, and assign appropriate fund source for each project. If CMAQ or JARC funds are used, MTC will program the project into the TIP. If STA funds are used, MTC will either allocate funds directly to transit agency or other eligible entity, as applicable, or will enter into a funding agreement with the CMA or other countywide administering entity for transfer of the funds to the project sponsor through a funding agreement. Projects funded must meet the eligibility requirements of the respective source of funds.

Project Delivery: All projects funded under the county programs will be subject to MTC obligation deadlines and project delivery requirements. All projects will be subject to a "use it or lose it" policy. Should there be a balance of non-programmed lifeline funds from a county's fund share after conducting the call for project/project selection process, an equivalent amount of funds would be reserved for the respective county for reprogramming to other Lifeline related investments at a future date.

Policy Board Adoption: Projects recommended for funding must be submitted to and approved by the respective governing board. The appropriate governing board shall resolve that approved projects not only exemplify Lifeline Program goals, but that the local project sponsors understand and agree to meeting all project delivery and funding match and obligation deadlines.

Project Oversight: The CMAs or equivalent countywide agency will be responsible for oversight of projects funded under the county programs and ensuring projects meet MTC obligation deadlines and project delivery requirements. In addition, the CMA or other administering entity will ensure, at a minimum, that projects substantially carry out the scope described in the grant applications. All scope changes must be fully explained and must demonstrate consistency with Lifeline Program goals.

CMAs or other program administrators are responsible for programmatic and fiscal oversight of new lifeline projects. As part of the Call for Projects, applicants will be asked to establish project goals, and to identify basic performance indicators to be collected in order to measure the effectiveness of the program projects. At a minimum, performance measures for service-related projects would include: documentation of new "units" of service provided with the funding (e.g. number of trips, service hours, workshops held, car loans provided, etc.), cost per unit of service, and a quantitative summary of service delivery procedures employed for the project. For capital-related projects, project sponsor is responsible to establish milestones and report on the status of project delivery.

Program Evaluation: MTC, in consultation with CMAs or other countywide program administrator will conduct a program evaluation to report on the results of the program, and to recommend future funding and programmatic oversight for the \$216 million dedicated to the program as part of the Transportation 2030 Plan. The cost to administer the program will be



considered as part of the program evaluation to be conducted upon completion of the three-year cycle.

**Lifeline Transportation Program Estimated Budget  
FY 2005-06 through FY 2007-08**

<b>Interim Lifeline Transportation Program Fund Source</b>	<b>Source of Funds</b>	<b>Amount</b>
First and Second Cycle CMAQ Funding	Funds originally programmed to the Regional Express Bus Program (now funded through RM2)	4,045,000
FY 2005-06 STA Regional Discretionary Program	1) Excess Generations from FY 2004-05; 2) Funds originally slated for TransLink® (now funded through RM2)	5,569,862
FY 2006-07 and FY 2007-08 STA Regional Discretionary Program	Funds set-aside to fund the LIFT program – now shifted to Lifeline Transportation initiative.	2,000,000
Urbanized-Area JARC funds FY 2005-06- 07-08	New JARC funds through SAFETEA-LU; MTC designated recipient for urbanized area funding	6,618,094*
<b>TOTAL</b>		<b>\$18,232,956</b>

\*JARC Funds for FY 2007 and FY 2008 are subject to a new coordinated planning requirement still under development by FTA.

<b>Estimated Funding Target per County FY 2005-06 through FY 2007-08</b>		
<b>County</b>	<b>% poverty population</b>	<b>3 year LTP funding Target</b>
Alameda	27.4%	4,995,831
Contra Costa	12.5%	2,279,120
Marin	2.7%	492,290
Napa	1.7%	309,961
San Francisco	15.1%	2,753,176
San Mateo	7.1%	1,294,540
Santa Clara	21.7%	3,956,550
Solano	5.5%	1,002,812
Sonoma	6.3%	1,148,676
<b>TOTAL</b>	<b>100%</b>	<b>\$18,232,956</b>

\* Based on federal poverty levels reported in 2000 US Census

Note: These are estimates intended for planning purposes only. Actual allotment of funds may differ than those indicated above, based on assignment of funding to eligible projects. These estimates do not include an additional \$1,346,441 in small and non-urbanized JARC funds available to the region that will be administered by Caltrans.

# Metropolitan Transportation Commission Programming and Allocations Committee

January 11, 2006

Item Number 3c

## Resolution No. 3726, Revised

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**Subject:** Revised Lifeline Transportation Program Guidelines and Budget.

**Background:** Last month, the Commission adopted MTC Resolution 3726, which incorporates program guidelines for the Lifeline Transportation Program (LTP) for a three-year period. The LTP is intended to result in improved mobility for low-income residents of the Bay Area, and will be overseen at the local (countywide) level. In March, project sponsors will issue a Call for Projects to solicit projects consistent with these guidelines.

As indicated in Attachment A of Resolution 3726, funding for the program is comprised of federal Congestion Mitigation Air Quality (CMAQ) and Job Access and Reverse Commute (JARC) funds, and State Transit Assistance (STA) funds. Originally, the budget reflected a proposed distribution of each source of funds to counties based on that county's overall share of the poverty population. Subsequently, staff has received clarification from the Federal Transit Administration (FTA) regarding the use of JARC funds that would not support a specific allocation to each county, because projects are expected to be selected through a competitive process to ensure they are consistent with program guidelines.

Staff therefore has revised Attachment A to remove fund specific assignments by county, more accurately reflecting the following funding approach:

- JARC funds will be "pooled" regionally with other sources of funds.
- Applicants for LTP funds will submit requests for funding to their respective county, without specifying the source of funds for any particular project.
- Each county will be assigned an overall "target" share of the regionally pooled LTP funds based on that county's share of poverty population. However, this target will not further stipulate specific shares of individual fund types. Within that target, counties, through a process that includes the participation of relevant stakeholders, will select projects through a competitive process that ranks them according to regionally developed criteria.
- Once projects are competitively selected at the local level, MTC will match requests to respective fund sources among all nine counties, based on the project's ability to meet the stated criteria as well as fund eligibility, not its geographic location.

The Program budget is as follows:

**Lifeline Transportation Program Estimated Budget  
FY 2005-06 through FY 2007-08**

<b>Interim Lifeline Transportation Program Fund Source</b>	<b>Amount</b>
CMAQ	4,045,000
FY 2005-06 STA Regional Discretionary Program	5,569,862
FY 2006-07 and FY 2007-08 STA Regional Discretionary Program	2,000,000
Urbanized-Area JARC funds FY 2005-06- 07-08	6,618,094*
<b>TOTAL</b>	<b>\$18,232,956</b>

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<b>TOTAL</b>	<b>100%</b>	<b>\$18,232,956</b>

\* Based on federal poverty levels reported in 2000 US Census

**Recommendation:** Refer MTC Resolution No. 3726, revised to the Commission for approval.

**Attachments:** MTC Resolution No. 3726, Revised.

## Appendix B: Detailed Lifeline Project Descriptions

### Alameda County

1. **AC Transit – AC Transit Hayward Service:** Provide day and evening service on Lines 83, 86 and 386 seven days a week in Hayward and South Hayward.
2. **City of Berkeley – Ashby BART Station/Ed Roberts Campus:** Install a new ramp, staircase, pedestrian pathway, crosswalk, universally designed bus shelter and transit information kiosk and signage.
3. **Alameda County Public Works – E. Lewelling Blvd Streetscape:** Install pedestrian improvements in Ashland and Cherryland to improve walking access to buses, schools and businesses.
4. **Oakland Public Library – Quicker, Safer Trip to Library:** Provide transportation to kindergarten students, teachers, and parents from elementary and preschools by bus to the West Oakland Library.
5. **Livermore Amador Valley Transit Authority – WHEELS Route 14 Service Provision:** Provide transit from low-income central residential district of Livermore to downtown Livermore employment center and transit center.

### Contra Costa County

6. **Tri Delta Transit – Low Income Access to Health Care:** Provide transit service to East Contra Costa County residents to access jobs, County health care, community colleges and social service facilities.
7. **CCCTA County Connection – Monument Community Shuttle:** Provide new shuttle service within the Monument Corridor, with access to a local health care clinic, shopping and transit connections at a discounted fare.
8. **CCCTA County Connection – CCCTA Route 111 weekend service:** Reinstate weekend bus service between the Concord and Pleasant Hill BART stations, providing access to employment, shopping and church.
9. **West Contra Costa Transportation Advisory Committee – Low-Income Middle School Student Bus Pass:** Provide free monthly bus passes to 660 low-income middle school households in the West Contra Costa County Unified School District.
10. **AC Transit – Continued Service on Line #376/Richmond:** Maintain transit service on Route 376, which provides late night service in Richmond and North Richmond with access to employment, BART and transit connections.

### **Marin County**

11. **City of San Rafael – Canal Street improvements to pedestrian access and safety:** Install pedestrian access and safety improvements along Canal Street in the Canal neighborhood of San Rafael.

### **Napa County**

12. **Napa County Transportation and Planning Authority – Installation of Bus Shelters and Seating:** Purchase and install bus shelters and seating at various VINE bus stops throughout Napa County.

### **San Francisco County**

13. **Tenderloin Housing Clinic – Outreach Initiative for Lifeline Transit Access:** Effort to conduct outreach to low-income households to facilitate increased access to MUNI transit by increasing awareness of the Lifeline Fast Pass, a discounted monthly pass for low-income persons.
14. **SF Municipal Transportation Authority – Muni Route 108/Treasure Island:** Maintain late night and more frequent service during peak periods and on weekends between San Francisco and Treasure Island.
15. **SF Municipal Transportation Authority – Muni Route 29 Service:** Add additional buses Monday through Friday to improve reliability and relieve over-crowding.
16. **Bayview Hunters Point Foundation for Community Improvement – Bayview Hunters Point Community Transport:** Offer subsidized transportation (taxi scrip, guaranteed ride home and community shuttles) to health-related services and jobs for Bayview–Hunters Point residents. Includes significant outreach about new transportation programs and community involvement during project evaluation.
17. **SF Municipal Transportation Authority – Lifeline Fast Pass Distribution Expansion:** Expand distribution of MUNI’s Lifeline Fast Pass to better accommodate recipients during distribution times. The project includes both capital improvements and operating support.

### **San Mateo County**

18. **San Mateo County Human Services Agency – Ways to Work Loan Program:** Provide low-interest loans to help families with: the purchase of a reliable, safe automobile to get to work on time; repairs for their automobile; or car insurance.
19. **City of South San Francisco – Public Transportation Workshops:** Develop a curriculum and present workshops to train low-income Spanish and English speaking individuals to effectively use public transportation.

20. **Family Service Agency – Transportation Reimbursement Independence Program:** Provide mileage reimbursement to volunteers transporting low-income seniors who have difficulty accessing public transit and/or Redi-Wheels, a no-cost service to low-income riders in order to address financial barriers to mobility, and an alternative low-cost transportation service to address gaps in existing services identified through a countywide needs assessment process.
21. **San Mateo County Human Services Agency – Transportation Assistance Program:** Purchase monthly bus passes and provide emergency taxi vouchers to low-income families and individuals (including youth and seniors).
22. **San Mateo Medical Center – San Mateo Medical Center Bus:** Purchase of a small bus, for both transporting older adults from their homes to the San Mateo Medical Center for medical and dental appointments.
23. **SamTrans – Transportation Mobility Solutions:** Provide enhanced and viable transportation mobility solutions for the low-income, elderly, and disabled population of the San Mateo County Coastside area.
24. **City of Redwood City – Fair Oaks Community Shuttle:** Implement a pilot shuttle service to connect residents with necessary services.

### **Santa Clara County**

25. **Outreach – Family Transportation Program:** Offers individualized transportation plans with flexibility to offer rides for entire family, as well as repair of personal vehicles.
26. **Outreach – Senior Transportation Program:** Provides older, minority seniors with a menu of transportation options.
27. **Family and Childrens Services – Ways to Work Family Loan Program:** Provides unique car loan services with comprehensive case management.
28. **City of Gilroy – Pedestrian Enhancement Project:** Capital funding project to build sidewalks and a pedestrian bridge in Gilroy.
29. **City of San Jose – Auto Repair Assistance Program:** Provides auto repair assistance to low-income residents.

### **Solano County**

30. **Benicia Community Action Council – Benicia Vehicle Loan:** Provides down payments for low-cost vehicles for specified low-income individuals. Funds will also provide required repairs for donated vehicles.
31. **Fairfield Community Action Council – Fairfield Transportation Assistance for Central Solano:** Funds emergency taxi vouchers, as well as program management for the distribution of bus and limited gasoline vouchers.

32. **City of Benicia – Industrial Park Shuttle:** Provides early morning and late night shuttle service connecting Benicia Breeze Rt. 75 with the Benicia Industrial Park and Fairfield/Suisun Transit System Rt. 40.
33. **City of Dixon – Saturday Local Service:** Funds Saturday service within and beyond Dixon.
34. **City of Rio Vista – Peak Service Route 50:** Initiates commuter service using small buses between Rio Vista and Fairfield.
35. **Kids Xpress – Kids Shuttle:** Provides expanded dedicated children’s shuttle service between home, childcare, and school.

### **Sonoma County**

36. **Sonoma County – Community Transportation Manager:** Addresses unmet transportation needs by developing advisory groups in low-income communities to expand existing transportation options and improve transportation choices.
37. **Santa Rosa CityBus – New Route 19:** Provides new service connecting Roseland residents to shopping, jobs and the downtown Santa Rosa transit mall.
38. **Santa Rosa CityBus – Hybrid Electric Buses for New Route 19:** Funds new electric buses for the new Route 19, as well as for Route 12 to ensure on-time performance.
39. **Sonoma County Transit – New Natural Gas Coaches for Intercity Routes Serving Sonoma County Low-Income Communities:** Funds new coaches for Sonoma County Transit intercity routes serving low-income communities in Sonoma County.

## Appendix C: Unfunded Projects

	County	Project Name	Project Sponsor	Project Type	Lifeline Funding Requested	Reason Not Funded	Comments
1	Alameda	West Oakland Bay Trail Gap Closure	City of Oakland	Ped/Bike Capital	\$1,400,000	Other funds available	
2	Alameda	Transbay Service from East Bay to SF Transbay Terminal	AC Transit	Fixed Route Transit	\$2,500,000	Didn't meet program goals/ eligibility	Low-income community only 12% of service
3	Alameda	Grove Way Pedestrian Improvement Project	Alameda County PWA	Ped/Bike Capital	\$1,560,000	Scored lower than funded projects	
4	Alameda	W. Oakland Senior Shuttle Expansion	Bay Area Community Service	Community Shuttle	\$241,055	Scored lower than funded projects	Did not appear cost effective for serving 200 people
5	Alameda	Lifeline Carsharing Program	Flex Car and City CarShare	Auto Program	\$1,378,050	Scored lower than funded projects	Service plan did not appear well developed
6	Contra Costa	Contra Costa College Connection Shuttle Expansion	WestCAT	Community Shuttle	\$687,933	Scored lower than funded projects	
7	Contra Costa	Bus Shelters and Amenities for Bay Point	Tri Delta Transit	Transit Capital	\$80,000	Scored lower than funded projects	
8	Contra Costa	CalWORKs Transportation Program Expansion	Contra Costa County EHSD	Demand Response	\$567,450	Scored lower than funded projects	
9	Contra Costa	West County Transportation Center Phase II	Neighborhood House of N. Richmond	Info/outreach	\$149,100	Scored lower than funded projects	
10	Contra Costa	West CC Taxi Safety and Accessibility Program	WCCTAC	Demand Response	\$107,500	Scored lower than funded projects	
11	Contra Costa	Mt. Diablo Mobilizer	RSNC Mt. Diablo Center for Adult Day Health Care	Community Shuttle	\$316,775	Scored lower than funded projects	
12	Contra Costa	West San Pablo Shuttle	City of San Pablo	Community Shuttle	\$1,100,000	Didn't meet program goals/ eligibility	
13	Marin	Community Mobility Manager	Marin County Dept. of Health & Human Services	Info/outreach	\$114,493	Other	TAM is working with HHS to further coordinate this project with TAM, HHS, and Marin Transit. Will be eligible to reapply for a second call for projects to take place in early 2008.
14	San Francisco	Tenderloin Pedestrian Enhancements	SF MTA	Ped/Bike Capital	\$359,000	Scored lower than funded projects	Lacked strong evidence of community participation, other funding sources are possible
15	San Mateo	Mobile Dental Van	San Mateo Medical Center	Demand Response	\$250,000	Didn't meet program goals/ eligibility	
16	Santa Clara	VTA/Community Partnership Transportation Program - Transit Passes for Low-Income People and Families	VTA	User Subsidy	\$3,000,368	Ineligible for funds	VTA went as far as recommending \$1,000,000 in funding for this project but was unable to fund due to the project's ineligibility under any Lifeline program funds
17	Santa Clara	Child Advocates - Bus Passes for Foster Care Youth	Child Advocates of Santa Clara & San Mateo Counties	User Subsidy	\$9,408	Ineligible for funds	
18	Sonoma	Route 80 frequency increase	Golden Gate Transit	Fixed Route Transit	\$6,395,092	Didn't meet program goals/ eligibility	Funding requested far exceeded funding availability



## Appendix D: CMA Questionnaire Results

### About the Questionnaire

The questionnaire for Lifeline program administrators was deployed online at SurveyMonkey.com on November 20, 2007. Email invitations were sent to CMA/county staff responsible for administering the Lifeline program locally. Eight of the nine county CMAs responded to the questionnaire. The survey instrument is attached to this summary.

### Summary of Responses

#### Q2. Who was involved in developing and issuing the Lifeline call for projects?

- Alameda County Congestion Management Agency and Alameda County Transportation Improvement Authority
- Martin Engelmann, in consultation with ACTA (Tess Lengyel) and MTC (Therese Knudsen).
- I assembled it, distributed it and assured that interested parties were aware of its availability.
- NCTPA Fiscal & Planning Manager set up program which was then approved by the NCTPA Board
- Therese Knudsen, MTC; Tom Madalena, C/CAG; Richard Napier, C/CAG
- SFCTA staff
- VTA Congestion Management Program & County Social Services Staff.
- Therese Knudsen of MTC, and Janet Spilman and Lynne March of SCTA

#### Q3. What efforts were made to help project applications fit the evaluation criteria?

- We provided applicants Frequently Asked Questions to help make the process clear. We also provided a list of previously approved projects. (This question is not very clear.)
- The evaluation criteria was formulated prior to the release of the call for projects. After project submittals were received, the criteria was not changed. Efforts to “fit the projects to the criteria” minimal.
- Call for projects specified evaluation criteria. Applicants were expected to understand them and structure their project with these criteria in mind.
- Applications from our area came directly from the MTC funding Napa Community Based Transit Plan
- We held a bidders workshop in which we invited local stakeholders to attend. At this workshop we encouraged applicants to apply for the types of projects that would fit the evaluation criteria.
- In addition to the workshop that was held prior to the call for projects, applicants (both during the call for projects prep stages and in the two months it was released) were encouraged to contact SFCTA staff members directly via phone and email for individual advice as to how a project idea could be more competitive based on evaluation criteria. We also discussed the call for projects at the SFCTA’s Technical Working Group meetings, and encouraged potential applicants to share ideas and information.

- Pre-submittal workshop to explain eligibility and answer questions.
- A 10-page “Frequently Asked Questions” was prepared and supplied to prospective applicants to better explain the program; funding sources and processes; project selection criteria; and application process and timelines. Additionally the call included the General Program Information, Attachments A (Communities of Concern), B (Examples of Eligible Projects), C (Funding Application), D (Scoring Criteria) and E (MTC Resolution 3726); and the low-income component of the Coordinated Public Transit-Human Services Transportation Plan.

**Q4. Please list who was on your project selection committee and the agency/organization they represented.**

- Tess Lengyel, ACTIA; Diane Stark, ACCMA; Yolanda Baldovinos, Alameda County Social Services Agency; Cindy Dalhgren, Contra Costa County Connection; Dawn Love and Maria Palmeri, MTC’s Minority Citizen’s Advisory Committee; Keith Cook, City of San Leandro Public Works Agency and ACTAC member; Melanie Choy, MTC Capital Program; Rube Brioned MTC Welfare to Work committee
- Paul Branson, Contra Costa County Employment and Human Services Department (EHSD); Cindy Dahlgren, CCCTA; Charlie Anderson, WESTCAT; Jannat Muhammad, West County CBO; May Lou Laubscher, Monument Corridor CBO; John Greitzer, County Board of Supervisors; Lisa Hammon, TCC; Candy Gales, MTC’s Minority Citizens Advisory Committee; Martin Engelmann, CCTA.
- TAM planning staff evaluated the two proposals received.
- 3 participants from our community based transportation plan stakeholder group.
- Kenneth Folan - Metropolitan Transportation Commission; Joe Hurley - San Mateo County Transportation Authority; Ross Nakasone - County of San Mateo County Manager’s Office; Pat Michelin - County of San Mateo Human Services Agency; Tom Madalena - City/County Association of Governments of San Mateo County
- Chris Iglesias, Director, CityBuild; Helen Kwan, Chinatown Community Development Center; Susie Gallagher, Manager of Paratransit Programs, BART
- Sandi Douglas: Housing Authority of Santa Clara County; Bena Chang: Silicon Valley Leadership Group (SVLG); Marjorie Matthews, Office of Affordable Housing County Executive’s Office; Cindy McCown: Second Harvest Food Bank of Santa Clara; Carolyn M. Gonot: Santa Clara Valley Transit Authority; Marcella M. Rensi: Santa Clara Valley Transit Authority
- Mona Babauta/Santa Rosa Dept of Transit & Parking/Santa Rosa CityBus; Bryan Albee/Sonoma County Transit; Al Redwine/Sonoma County Human Services Department; David Rosas/California Human Development Commission and Rosalinda (a Roseland community-based organization)

**Q5. Please explain how members of the project selection committee were chosen.**

- Representing program; low income community; transit and capital projects. 1) Lifeline fund administrators to understand program requirements, 2) low income community representatives: a) social services, b) Citizen representatives (MCAC & MTC Welfare to Work) 3) transit operator outside of our county to understand transit projects and be objective, 4) public works staff to review capital project with knowledge & to represent cities; 5) MTC to review capital projects knowledgeably.

- A variety of alternatives were feasible. Staff researched the composition of similar committees in other CMA's throughout the Bay Area. Different compositions were discussed by the Authority Planning Committee. Following that discussion, staff recommended the final committee composition, which the Authority adopted.
- management decision.
- Local representatives for community based programs or needs chosen directly from the stakeholder group that worked on the community based transportation plan.
- We attempted to have a well-rounded committee made of members that were familiar with transportation programs and funding or with the types of services that are needed by the lower income population of San Mateo County.
- The committee members were chosen based on MTC criteria (a transit operator, a social service agency, and a community stakeholder), knowledge of lifeline transportation needs and San Francisco issues, and included persons without direct connection to any of the project applications (e.g., agency not specifically in the Tenderloin neighborhood, not MUNI staff).
- Members of Joint Lifeline Transportation Committee (JLTC) created by the MOU between the County of Santa Clara and VTA to administer the Lifeline Transportation Program.
- Selection was based on the recommendation of MTC.

**Q6. What were the project evaluation criteria your committee used to score or rank projects?**

- Project development (needs/goals); service operations (implementation plan); project budget/sustainability; coordination and program outreach; cost effectiveness; demand; outside funding; project readiness.
- All of the MTC-specific criteria developed through the Guidelines was applied. In addition, the following Contra Costa-specific criteria was included: 1) Demand: Serves a high volume of "Communities of Concern," 2) Employment Mobility: provides new workforce mobility, 3) Outside funding (matching funds, etc.), 4) Project readiness.
- The criterion which separated the chosen project from the rejected one was its consistency with our Community Based Transportation Plan Goals. The winning project was consistent with the CBTP. The losing project was not.
- MTC's base criteria was used
- We used the evaluation criteria that was provided as Attachment D by MTC in the Call for Projects.
- 1. Project Need/Stated Goals and Objectives 2. Implementation Plan 3. Project Budget/Sustainability 4. Coordination and Program Outreach 5. Cost-effectiveness and Performance Indicators 6. Project Readiness 7. Level of Local Match 8. Program/Geographic Diversity
- Used MTC's criteria.
- MTC supplied criteria were used, with weighting assigned by SCTA staff in consultation with the Scoring Committee.

**Q7. How competitive was the selection process? Please select the best answer.**

- 4 of 8 responded “The selection process was not very competitive due to the small number of applications received.”
- 3 of 8 responded “The selection process was somewhat competitive; scoring for some (but not most) of the projects was very close.”
- 1 of 8 responded “Other: We selected 5 out of 10 applications. Some applications did not fit the program requirements; others were close.”

**Q8. Please describe any formal or informal opportunities for public comment on the project selection process.**

- We took our recommendations from the selection committee to our public committee and Board meetings for input from them and the public.
- The initial informational meeting to discuss the grant program, the funding process, and the timeline was held in an open workshop setting. Following that, all meetings of the Planning Committee and the Authority were held in accordance with the Brown Act; comments from members of the public were encouraged as the process transpired and the list of projects was developed.
- Staff recommendations for selected projects were approved by the TAM Executive Committee and the TAM Board of Commissioners at their monthly public meetings. Each of these meetings is widely advertised, but the project recommendation was approved by both bodies unanimously without public dissent.
- One publicly noticed stakeholder meeting to discuss project selection process and also which projects to submit.
- When we held the bidders workshop we had a few community groups that were represented that expressed their opinion on the program. Staff also received comments from interested community groups via email during the call for projects.
- In addition to the workshop that was held prior to the call for projects, we encouraged anyone notified about the pre-call workshop to contact SFCTA staff to provide input on evaluation criteria, as well as on our website and by announcement at SFCTA Board meetings prior to the call for projects. There was also opportunity for public comment on the draft project list at the SFCTA’s Citizens Advisory Committee, Plans and Programs Committee, and SFCTA Board meetings prior to final project selection.
- Scoring Committee meeting was Brown Acted. Draft lists were reviewed by VTA and County Board Committees in public meetings.
- The proposed “Program of Projects” was approved by the SCTA Board. Public comment opportunity is provided at these meetings and notice of the agenda items are made by website posting and mailings in advance of the public meeting. The “Call for Projects” was also mailed to about 65 people and posted on the SCTA website.

**Q10. Please enter the number of Lifeline applications received for each kind of project:**

- Capital projects 15
- Operating projects 22
- Programs 12

**Q12. Please describe how the Community Based Transportation Planning process in your county contributed to your Lifeline program of project(s). Describe whether this relationship was direct, whereby selected projects came directly from the Community**

**Based Transportation Plans, or indirect, whereby participants in the Community Based Transportation Planning process contributed to the development of Lifeline projects in other ways.**

- One CBTP was completed when we issued the Call for Projects. The other CBTP areas demonstrated in their applications that they served the target community and had undergone other community plan processes. Two approved projects were from the completed plan area. Two were from other plan areas that had completed other community processes. One was from an area that was not identified as a CBTP, but demonstrated that they served the target community and had completed other community processes.
- 9 of 12 projects came directly from CBTPs. One project came from a Welfare to Work Plan, and two were developed independently.
- It was direct.
- Direct
- No projects came directly from the East Palo Alto Community Based Transportation Plan. Some of the lessons learned were applied to other communities nearby.
- We had 2 CBTPs either nearly or fully complete at the time we issued the Lifeline call for projects. 2 of the submitted projects came directly from CBTP recommendations (1 from each plan). 2 other applicant projects were initiated by an active community partner in one of the CBTPs.
- One of the projects came directly from a CBTIP. The others were from the Welfare to Work plans.
- 2 of the 4 funded projects arose directly from the Roseland CBTP

**Q13. How many of your projects came from Community Based Transportation Plans? (Please provide a number.)**

- 23 total

**Q14. Are any of your projects up and running/implemented? If so, which ones?**

- Yes, 3: 1) AC Transit Hayward extended services, 2) Quicker Safeter Trip to Library, W. Oakland, 3) Wheels Route 14 Service, Livermore.
- Yes. AC Transit Line #376, Tri Delta's Line #200, and the Monument Community shuttle.
- No. We have not yet been made officially aware whether MTC approved funding for the selected project.
- Working on bus stop project.
- Coastside Opportunity Center/SamTrans - Transportation Mobility Solutions City of South San Francisco - Public Transportation Workshops
- Two of our projects are up and running (though just barely): 1-Tenderloin Housing Clinic Muni Lifeline Fast Pass Outreach 2-Bayview Hunters Point Community Foundation Access to Health Project. I do not know the status of the other 3 projects that received funding as they are administered by MTA and do not have to go through us to receive reimbursement.
- Two. OUTREACH - Senior Transportation Services Family & Children's Services - "Ways to Work" program

- None at this point

**Q15. Have any unexpected barriers been encountered with project funding and delivery? Have they been overcome? How?**

- Two main issues: complete funding plan & completing design and environmental for capital projects. 1) Ashby BART/Ed Roberts Campus - access improvements - this is part of a large project so funding was being compiled for the whole project to make it efficient. Funding plan is now complete; expected to go forward this year. 2) E Lewelling Blvd sidewalk access - project is being designed; expected to go forward in 2008.
- The major barrier was that MTC's funding sources did not allow for fare subsidies or discounts, which meant that we had to do a fund exchange.
- Not yet.
- Don't know how to get to funds but I'm sure MTC will provide explicit information when we start spending money. We have received entirely STA funds and I understand this had something to do with annual claim application but process was not clear or understood.
- Out of the seven applicants, only two programs are currently being implemented. The other five applicants are still waiting on execution of agreements with MTC or the transit operator. While MTC has been a terrific support in helping us get the agreements to the applicants, there also seems to be confusion about the overall process and expectations in getting the final agreements executed. Our recommendation is to provide a website for applicants to review the status of their resolutions and contract agreements.
- Yes, at least for the 2 projects we're actively monitoring. The barriers we encountered were: 1-Information. Our call for projects went smoothly, but we simply had no idea that the steps between our Board's approval and actually getting project funding agreements in place would be so difficult or time consuming. Some of the project sponsors were also taken by surprise by the amount of time (and the amount of administrative work) necessary to access the funds. Now that we all have a better idea of what to expect, I hope better guidelines on the grant cycle schedule and process will be available for the next call. 2-Matching one project's scope with eligible fund sources. The BVHP Access to Healthcare component was given a mix of JARC and STA funds, neither of which were really appropriate for one of the approved scope elements - a guaranteed ride home program for health care appointments (i.e. not a jobs program). Since the local match was in-kind, there was no way to fund the program as it was approved, so the project sponsor had to modify the scope to make it an open-ended program rather than one that just focused on access to healthcare. 3-Non-profit (i.e. ineligible) project sponsors. 2 of our projects were sponsored by non-profits and therefore had to be channeled funds through another (eligible) agency. I also believe at least one of the MTA projects we programmed has encountered some funding/delivery difficulty, but because of the way oversight is set up, we don't have specifics about it. I think MTC does, though!
- Yes. We had project eligibility problems due to the funding that are mostly resolved. We also did not anticipate the length of the FTA Grant cycle and that has added almost a year between VTA project approval and actual ability to initiate the project. This may not be able to be resolved.

- None noted at present. In the case of Sonoma County, CMAQ funding was no longer available. This perhaps decreased the flexibility of the program in that certain projects, such as pedestrian and bicyclist improvements, were not included under STA and JARC.

**Q16. Given that non-profits cannot directly receive all Lifeline funds (but are eligible to apply), how would you encourage or facilitate partnerships between local community based organizations/non-profits and transit operators?**

- CBOs or non-profits have to be very well organized with a track record of moving projects to completion, and with available staff to manage the project. If they worked with a transit operator, for example, they would have to have a good working relationship and would have to readily provide a service that would supplement and complement the transit operator's service.
- These partnerships are difficult to create and maintain. I believe that the transit agencies need to take the lead role, and they might have a chance to bring the CBO along through a grass-roots outreach effort.
- I don't know.
- continue to have the stake holder group meet.
- We will approach SamTrans to ask them to be a willing participant. We would encourage SamTrans to do so because in some cases the partnerships will be beneficial to SamTrans. We believe that in order to get non-profits and other community based organizations to participate in Lifeline that a steady stream of revenues be made available on an ongoing basis. Moreover, there needs to be some mechanism to streamline the approval and contract process so that there is not the large waiting periods between application, approval of application and execution of funding agreement.
- I still think it's still important to allow non-profits to apply for and receive Lifeline funds even if this clearly provides more challenges to administering the program. However, I hope that going into the next round (with one cycle already under our belts) we will be able to put together clear guidance on how a funding partnership between the non-profit and MTC/the CMA/the transit operator will be structured for each of the possible fund sources. It seems like the CBTP process itself will encourage partnerships and coordination between community organizations, the CMA, and transit operators. Hopefully in the next Lifeline cycle this will result in more integrated, community-prioritized project submissions. As far as facilitating joint applications or more informal partnerships, I know this is something we struggled with in the last cycle and hope to do better next time.
- We required that the non-profits already have an eligible project partner at the time of application.
- By making the process understandable and screening potential applicants for eligibility.

**Q17. Do you have any ideas about how you could improve the administration of the Lifeline program at the county level?**

- The program start-up is very time intensive. It would help to have dedicated, funded staff time for the start up (RFPs, application review, selection, at a minimum). It's also helpful to coordinate efforts among Counties so that we can share information and do not have to duplicate efforts. It's helpful to have model RFPs, applications, program requirements, etc from MTC.

- Improve project monitoring, to find out project performance regarding ridership, cost per ride, and percentage of people served who qualify as members of Communities of Concern.
- No.
- Our program is so small and we are unique in that the CMA and the applicant are the same agency. It's difficult to get any simpler.
- Our recommendations are as follows: 1) Provide a timeline for application, award, acceptance of resolutions, execution of agreements early in the process so that expectations can be managed more effectively. 2) Develop a website that allows applicants to view the status of their project approvals 3) Provide the CMA with final copies of the executed agreements 4) Develop a mechanism such as "Notice to Proceed" or "Notice of Completion" so that the applicant, CMA, and MTC are aware of the status of each project.
- For the next cycle, we hope to provide greater transparency to community members about how their comments/suggestions are passed on to potential project sponsors.
- Limit STA funds to transit operators.
- The real or perceived complexity of the program's processes may act as a deterrent to potential applicants, particularly entities with small staff resources

**Q18. Who is involved in the project monitoring/oversight process?**

- ACCMA. Also, once a year, the selection committee will meet to review the project progress and identify and address any unresolved issues.
- The LTP project manager at CCTA (Martin Engelmann) conducts the project monitoring.
- TAM Planning Staff
- Fiscal & Planning Manager
- We have not gotten to the implementation part yet. We are just starting two of the programs but will ask the applicants to send us reports on a regular basis. In general, the applicants are monitoring their own programs at this stage.
- Once all the projects get up to speed, Authority staff will be responsible for the week-to-week (month-to-month?) monitoring of Lifeline projects. Our Board of Commissioners has also requested quarterly updates on each of the projects. We expect to begin providing these reports to our Board in January or February of 2008.
- VTA CMP staff
- SCTA & MTC

**Q19. How many Lifeline projects is your agency monitoring? Please provide any further explanation as necessary.**

- 5 (see previous answers)
- We have not conducted any monitoring to date. Monitoring will be conducted through the invoicing process.
- Assuming MTC approval, one.
- 1
- Seven. Two are being implemented. Five are pending execution of contracts.
- We approved 5 projects for Lifeline funds. We are directly involved in the monitoring/oversight of 2 projects (BVHP and THC). At some point, I hope we will be



involved in the oversight of the other 3 MTA projects, but I'm not sure if the grants have even been started yet.

- 6
- 4 projects were approved for funding over three years

**Q20. Are you planning to evaluate the Lifeline projects once they are up and running?**

**Please explain.**

- Yes. We will meet with the selection committee once a year to review and evaluate each funded program or project.
- Yes, we plan to evaluate the projects through the invoicing process.
- Yes. What's to explain.
- not really
- Yes. We (CMA) plan to ask the applicants to give us a status report and track their progress as well as their project costs once the projects get further along.
- Yes. We worked with MTC to include, as part of the funding agreements, the performance measures established by our Board for each of the Lifeline projects in the quarterly reporting requirements. We will monitor the projects through the quarterly reports, and then we will likely do a more comprehensive evaluation of the projects either upon their completion or prior to embarking upon the 2nd Lifeline cycle call for projects.
- Yes. Evaluation criteria & reports are built into the project agreements.
- As directed by MTC

**Q21. Please indicate the degree to which the Lifeline project(s) selected in your county met the following program goals:**

- Developed through a collaborative and inclusive process, including outreach to underrepresented stakeholders: (average rating) 4.5
- Address transportation gaps in designated communities of concern based on locally based needs assessment (CBTPs, Welfare to Work plans, or other documented need): (average rating) 4.25
- Improve a range of transportation choices for low-income people with new or expanded services: (average rating) 4

**Q22. Please rate the extent to which the Lifeline program meets the MOST IMPORTANT mobility needs of your county's low-income population. A score of 1 is the lowest, a score of 5 is the highest.**

- Average Rating: 3

**Q23. Please identify any aspects of your agency's administration of the Lifeline program that could be considered a best practice or which you feel would be of interest to other agencies administering the program. These practices could encompass, for example, internal program staffing and administration, the project solicitation and selection process, outreach and coordination with transit operators or non-profits to implement projects, and coordination with other programs/services.**

- It was helpful to have Frequently Asked Question available for project applicants and for ourselves. (Other counties used our FAQs) Our selection team represented program administrators familiar with program requirements; targeted communities; capital and transit projects.
- NCTPA is unique so our practice is not really replicable.
- We attempted to be creative by having the transit operator, SamTrans, swap funds so that the Transportation Assistance Program would be possible.
- We were very successful in engaging CBTP participants in the Lifeline project development process, as well as other agency partners. I'm not sure how that could be a transferable "best practice," though.
- Imposing a minimum grant request. Making having a public agency/STA Grant recipient partner a requirement for STA funded projects.

**Q24. What would you recommend changing about the Lifeline program for the next funding cycle?**

- It would be helpful to receive funding to cover all or part of the program administration time. This is a time intensive program, especially in the early stages. It'd be helpful to keep the requirements as simple as possible and consistent with the funding sources. It's important to make it very clear who the program is intended to serve.
- We tell the "communities of concern" that they should feel unfettered when describing their needs. But the funding sources limit their choices about what can be implemented. In these communities that makes the planning process seem like another inadequate program on which they've lavished their time and effort.
- Better follow from MTC in terms of how to access funds.
- Development and publish a workflow that clearly shows who is doing what when and what should the applicant expect. Provide adequate funding to CMAs so that they can properly monitor the projects. Make the funding agreement very general with the specifics in the attached scope of work to expedite the review process.
- 1-Provide very clear guidance about the process/timeline for awarding the funds. 2-Match funds more appropriately to projects, and/or solicit input from project sponsors/CMAs prior to making fund source decisions. This could allow the project sponsor the opportunity to weigh in on the "hard choices" since they are closer to the project. 3-Be explicit (and accurate!) in the guidance about what projects are ineligible for funding. I think we'll all be wiser this next cycle, so hopefully we'll see the eligibility issues earlier in the process this time. To manage expectations, though, it's important not to solicit applications under the guise that "we'll make it work" if there really is little opportunity to do so. 4-Most importantly, the Lifeline program must be able to fund priorities coming out of the CBTPs. While in many cases this is consistent with the transit focus of the current Lifeline fund sources. However, with the proposed elimination of CMAQ funds from the next grant cycle, this means that bicycle and pedestrian projects will no longer be eligible for Lifeline funds. Unfortunately, streetscape safety and security improvements are of enormous importance to San Francisco's communities of concern and are key elements of the completed CBTPs. It will be a challenge to explain to all of the community members who participated in crafting these plans that many of their top priority Lifeline projects are not eligible for funding in the Lifeline grant program.

- See previous question.
- The timelines from project approval and funding seem long.

**Q25. Please provide any other feedback you feel would be helpful to this evaluation.**

- It'd be helpful if we could continue to fund a range of projects to improve mobility for the low income communities--operating, capital and programs.
- I was a novice to this process, but MTC staff was helpful and professional at all times. Thank you.
- Overall, all of our applicants felt that the program is great, the support from the CMA and MTC was terrific, and we need to find a way to streamline things so that the funding can be delivered in a timely fashion. Applicants complained that while waiting for the funding agreement to be executed, some of their vendors could not hold the price of the contract for professional services. Therese Knudsen is a pleasure to work with and did a wonderful job helping us work through some of the challenges during the application and selection process.
- Thanks!
- It is somewhat unclear what the interface with the "coordinated plan" is to entail.

## Welcome

Thank you for completing this questionnaire for the Interim Lifeline Transportation Program evaluation. The Interim Lifeline Transportation Program covers the FY 05/06 - 07/08 funding cycle outlined in MTC Resolution 3726 Attachment A.

The questionnaire has five parts: call for projects and project selection, program administration, oversight, program goals, and general program feedback.

Only one questionnaire should be completed for each county. The questionnaire is designed to take approximately 20 minutes to complete. If you would like to save your progress at any point, please click on the "exit this survey" link in the top-right corner; you can save your work and return to the survey at a later time. Note that most questions (marked with an asterisk) are required to have a response.

If you have any questions or comments about this questionnaire, please call Jennifer Yeamans at 510-817-5764, or email [jyeamans@mtc.ca.gov](mailto:jyeamans@mtc.ca.gov).

Please complete all five parts of this questionnaire by November 30.

### \* 1. Please provide your contact information.

Name	<input type="text"/>
Position	<input type="text"/>
Department/agency	<input type="text"/>
Email address	<input type="text"/>
Phone number	<input type="text"/>

## PART I. PROJECT SELECTION

The following questions cover the call for projects and project selection process.

### \* 2. Who was involved in developing and issuing the Lifeline call for projects?

### \* 3. What efforts were made to help project applications fit the evaluation criteria?

**\* 4. Please list who was on your project selection committee and the agency/organization they represented.**

**\* 5. Please explain how members of the project selection committee were chosen.**

**\* 6. What were the project evaluation criteria your committee used to score or rank projects?**

**\* 7. How competitive was the selection process? Please select the best answer.**

- ☐ The selection process was extremely competitive, with most projects scoring very close to one another.
- ☐ The selection process was somewhat competitive; scoring for some (but not most) of the projects was very close.
- ☐ The selection process was not very competitive due to the small number of applications received.
- ☐ The selection process was not very competitive due to the fact that the results of project scoring were not very close.
- ☐ Other (please explain)

**\* 8. Please describe any formal or informal opportunities for public comment on the project selection process.**

**\* 9. How many project applications did you receive in response to the Lifeline call for projects? (Please provide a number.)**

**\* 10. Please enter the number of Lifeline applications received for each kind of project:**

Capital projects	<input type="text"/>
Operating projects	<input type="text"/>
Programs	<input type="text"/>

**\* 11. How much Lifeline funding was applied for in your county (the sum of all project applications received)? Please provide a dollar amount.**

**\* 12. Please describe how the Community Based Transportation Planning process in your county contributed to your Lifeline program of project(s). Describe whether this relationship was direct, whereby selected projects came directly from the Community Based Transportation Plans, or indirect, whereby participants in the Community Based Transportation Planning process contributed to the development of Lifeline projects in other ways.**

**\* 13. How many of your projects came from Community Based Transportation Plans? (Please provide a number.)**

**\* 14. Are any of your projects up and running/implemented? If so, which ones?**

## PART II. ADMINISTRATION

The following questions cover the administration process of the Lifeline program.

**\* 15. Have any unexpected barriers been encountered with project funding and delivery? Have they been overcome? How?**

- \* 16. Given that non-profits cannot directly receive all Lifeline funds (but are eligible to apply), how would you encourage or facilitate partnerships between local community based organizations/non-profits and transit operators?**

- 17. Do you have any ideas about how you could improve the administration of the Lifeline program at the county level?**

### PART III. OVERSIGHT

The following questions cover project oversight and reporting. According to the program guidelines, the CMAs or equivalent county agencies are responsible for oversight of projects funded under the county programs and ensuring projects meet MTC obligation deadlines and project delivery requirements.

- \* 18. Who is involved in the project monitoring/oversight process?**

- \* 19. How many Lifeline projects is your agency monitoring? Please provide any further explanation as necessary.**

- \* 20. Are you planning to evaluate the Lifeline projects once they are up and running? Please explain.**

### PART IV. PROGRAM GOALS

The following question covers the goals of the Lifeline program.

**\* 21. Please indicate the degree to which the Lifeline project(s) selected in your county met the following program goals:**

	1 - Not at all	2 - Not very much	3 - Neutral	4 - Somewhat	5 - Very much so
Developed through a collaborative and inclusive process, including outreach to underrepresented stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Address transportation gaps in designated communities of concern based on locally based needs assessment (CBTPs, Welfare to Work plans, or other documented need)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve a range of transportation choices for low-income people with new or expanded services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## PART V. GENERAL QUESTIONS

The following questions are applicable to the Lifeline program in general.

**\* 22. Please rate the extent to which the Lifeline program meets the MOST IMPORTANT mobility needs of your county's low-income population. A score of 1 is the lowest, a score of 5 is the highest.**

	1	2	3	4	5
Rating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**23. Please identify any aspects of your agency's administration of the Lifeline program that could be considered a best practice or which you feel would be of interest to other agencies administering the program. These practices could encompass, for example, internal program staffing and administration, the project solicitation and selection process, outreach and coordination with transit operators or non-profits to implement projects, and coordination with other programs/services.**

**24. What would you recommend changing about the Lifeline program for the next funding cycle?**



**25. Please provide any other feedback you feel would be helpful to this evaluation.**



## Appendix E: CMA Stakeholder Input

This section summarizes input received from the CMA Stakeholders Group. Included are a summary of comments made by meeting participants and a copy of the discussion guide used in the meeting, which was sent to participants beforehand. The meeting was held November 13, 2007, at MTC, with the following individuals in attendance:

Natalie Allen	Santa Clara County
Denise Boland	Santa Clara County
Adriann Cardoso	Napa County Transportation and Planning Agency
James Corless	Metropolitan Transportation Commission
Amber Crabbe	San Francisco County Transportation Authority
Martin Engelmann	Contra Costa Transportation Authority
Tracy Geraghty	Napa County Transportation and Planning Agency
Therese Knudsen	Metropolitan Transportation Commission
Tom Madalena	City/County Association of Governments of San Mateo County
Elizabeth Richards	Solano Transportation Authority
Eric Schatmeier	Transportation Authority of Marin
Diana Shu	City/County Association of Governments of San Mateo County
Diane Stark	Alameda County Congestion Management Agency
Sandy Wong	City/County Association of Governments of San Mateo County
Jennifer Yeaman	Metropolitan Transportation Commission

### *Via teleconference:*

Bill Hough	Santa Clara Valley Transportation Authority
Marcella Rensi	Santa Clara Valley Transportation Authority

### *Additional input subsequently received from:*

Lynne March	Sonoma County Transportation Authority
Peter Engel	Contra Costa Transportation Authority

## Summary of Input Received by Topic

### *Application Process*

- For Prop 1B call, don't want different criteria for a small program vs. a large program — confusing
- In general, application process went fairly well, but eligibility issues with projects
- Funding sources and program goals don't always line up
- Limitations of funding sources: flexible but didn't work in practice
- Scared of Prop 1B requirements: no eligible projects in last two funding rounds
- Some (outside the CMAs) had expectations of the program that transit operators would get all the money
- Really specify who is this money for

- Were successful at getting non-profits to apply, but then there were problems with project eligibility
- After applications came in, there were eligibility problems; hard to match proposals to fund sources
- Worried about who will want to get involved next time because of the amount of difficulty encountered
- Synergies (between program goals and project development): kickoff workshop was helpful, and there was a direct connection to projects coming from CBTPs
- Beginning of process was exciting, but the delays in funding cause projects to lose innovative nature
- Not specific enough about project sponsor
- Some counties required up-front project sponsor with non-profit partner
- Need to be able to know whether they will be able to consider any projects that aren't transit.
- Application and project selection process: Stakeholders change depending on color of money. Mismatch of project/stakeholder input vs. project eligibility. A bit of an issue in the previous call, likely to become more of an issue in future.
- The whole point of the program is to help low-income people, but it's hard to target projects exactly to low-income people. People are more dispersed here in rural counties; communities of concern and census tract-level analysis don't work as well in rural counties, which have unique transportation issues such as farm worker transportation. For example, some small towns aren't a "community of concern" but there are certainly low-income people there. How to reach them with a countywide program?
- One project that was funded was buses that ply the more-traveled routes, which serve the transit dependent. Every city has low-income residents. CBTP planning process seems circuitous, to apply findings of one plan to another low-income area
- Hard to address needs of poor folks out in rural areas with no access to paratransit
- The selection committee was diverse, but three committee members were also applicants. Even though sponsors recused themselves from scoring their own projects, people were still scoring each other's projects. In the future would be better to make it a broader group. Try to get other people from other agencies, but people need at least at least a rudimentary understanding of transportation and grant processes — these are volunteers, and not all evaluators are the same or approach the process the same

#### *Project Application*

- Had group input to add evaluation criteria
- No problem with criteria except project budget/sustainability is difficult to answer. Isn't it seed money? How realistic is this?
- Matching funds was difficult for social service agencies
- Agreement on the fact that the criteria generally worked
- No issues with reviewing applications, the issues are with what happened afterwards
- Sustainability: hard for operations to be sustainable; maybe get a few less points but score higher elsewhere
- With multiple funding cycles, the ability to deliver/project readiness is a key criterion to consider in the evaluation

- Capital vs. operating projects: performance measures are hard to achieve for capital projects and hard to measure
- Access to schools/mobility improvement (like sidewalks/ped improvements)
- Needs to be access to transit
- Minimum and maximum funding amounts; flexibility (of project scope) is key
- Would like there to be more direct connection with CBTPs
- No changes needed
- Application was OK, but probably too daunting for non-profits to apply. Criteria were pretty good.

#### *Partnerships and Interagency Coordination*

- How to better facilitate partnerships? Some counties had not much participation from CBOs
- Disconnect following a meeting they had with public works department: make sure people in meetings are the actual grant-writers, and understand how to relate to CBTP needs
- CBTPs can't engage welfare-to-work stakeholders; Santa Clara County has updated its welfare-to-work plan (other county plans may be growing outdated)
- If program is expanded to elderly & disabled, then even more outreach is needed
- Need more legwork ahead of time to solicit project champion(s)
- Hard for CMA staff to find time to prod project sponsors; "missing link"
- Non-profits/agencies don't have staff to follow through (on project proposal follow-up)
- Make a more prescribed list of what is eligible
- Bring in cities, program coordinators (e.g. East Palo Alto's transportation coordinator funded under LIFT)
- Bus pass issue with eligibility
- Issue with innovative projects: cost/trip is high and number of people served low compared to competing projects
- Public officials want cost-effective projects, which is not the point of Lifeline transportation
- Winners were transit operators, but Lifeline is just back-filling what operators have been forced to cut previously
- Monument Corridor Shuttle has low ridership because even the reduced fare is still a barrier
- Public/private partnerships difficult, e.g. working with taxi companies
- One evaluation committee had community members who engaged in "predatory scoring" of projects
- Next time would be helpful to have a workshop on how to write a proposal (more technical assistance)
- Give everyone the list of what got funded so they can see what's possible
- As with the Transportation for Livable Communities program, bring copies of successful applications to workshops as examples
- Next cycle of projects: Need more "liberal" definition of Lifeline: suburban and urban transit operators already serve the transit dependent. Need flexibility for transit operators to include more under the Lifeline banner: not just evening and weekend service, but

ALL service hours are Lifeline/transit dependent riders. Increase effectiveness of current service, replace vehicles that all riders can use

- Complexity of program makes non-profits disinclined to apply, too daunting (especially the federal process), don't have the resources/staff to manage. All our applications were major transportation providers and county human services. It is a barrier for small agencies with limited staff to even think about applying. What might help/improve this? Education/outreach/simpler application?
- Interagency coordination; don't know how to reach out to the non-profits. Felt like the call for projects was overwhelming; people don't even have time to read it

#### *Project Monitoring*

- Hard for the CMAs to monitor projects, one plans to meet once per year with each project sponsor
- Another CMA has quarterly reports
- Another has quarterly monitoring system for all cities, and has extended this same system to Lifeline project sponsors
- Prop 1B will come with their own obligation deadlines so oversight not much of an issue.
- Alameda County TAC (ACTAC) requests that MTC monitor the progress of Lifeline projects. They are interested in seeing how well the Lifeline funds serve the targeted communities. This element would be beneficial in the next Lifeline Program

#### *Funding Issues*

- Contracts and selection of funds off-cycle
- Line up call for projects with JARC/FTA cycle
- Matching funds is a good role for MTC
- Project sponsors expected funds much earlier
- Work on funding agreements sooner in the process; takes too long
- Wants to deal with MTC directly and not go through CMAs
- Wants MTC to do contracts & invoicing; CMAs to do front end
- Costs of administering the program are a concern
- With no CMAQ funding in the future program, no bike/ped projects will be eligible for dense urban environments (where majority of low-income people's trips are by non-motorized modes)
- Three-year funding cycle is good based on time involved to administer
- "Break off" a chunk of total funding to reserve for smaller projects
- Have different % for different types of projects: operating, capital, programs
- How do you guarantee that bus capital stays with communities of concern?
- Use examples of capital projects
- Keep focus on communities of concern
- Three main issues: (1) Coordinate timing of funding cycle, (2) be clear on eligibility, (3) be clear on who the money is for; demonstrate that it serves the intended populations
- Scheduling: Don't schedule next call for Lifeline projects during Track 1 of RTP call; too much for the CMAs to handle

- How will CBTP projects not tied to transit projects get funded? What leverage does MTC have with other funds? What are eligible uses for those funds under state law? Need a clear definition for the next call of what projects are eligible
- Problems with the color of money are only going to get worse
- Any non-profit projects are out the window for the next round of funding with the funding sources narrowed down
- Don't think balancing capital and operating projects will be an issue in Contra Costa County. Looking at starting at a mobility management option through New Freedom
- Had to make the mobility manager position "fit." If someone wants to do mobility management, there's Lifeline, 5310, New Freedom, a multitude could fund this, but how to meet all the different requirements? Get one amount of money out of one program to do what the funding specifies.
- Amount of money is based on 2000 Census. Can this be revised prior to the next call or do we have to wait till 2010?
- Funding requested was pretty close, so amount of funding wasn't that big a deal. The program had a good, balanced outcome: city/county projects, startup projects, communities of concern represented. The more competitive it is, the more important it becomes to be very fair
- Would like CMAQ money to be available going forward
- Two funding sources were left. I don't know how Therese made it work, but she made it work. Don't envy anyone having to administer a program like this
- Biggest challenge was complexity of program. CMAQ money wasn't there because they came in late. Therese was very helpful, providing a FAQ from a different county. Hard to ferret out what would and would not be eligible. CMAQ would have been primary source for bike/ped projects, which were the highest-priority projects coming out of our only CBTP, but they could not be funded

## **MTC Lifeline Transportation Program Evaluation CMA Stakeholders' Group Meeting Overview and Discussion Guide**

November 13, 2007, 1:00pm – 3:00pm

MTC, 101 8<sup>th</sup> St., Oakland

3rd Floor, CR Fishbowl

### **Meeting Purpose**

To assist stakeholders in preparing for the November 13 Lifeline Transportation Program Evaluation kickoff meeting, this discussion guide is provided to introduce the topics we hope to discuss. To help ensure the meeting will be both informative and productive, it would be of great value if those participating in the meeting would review this document in advance and come to the meeting prepared to contribute to the discussion on the subjects outlined below. If, after reading this document, you would like to suggest other high-priority topics for discussion on November 13, please e-mail Jennifer Yeamans at [jyeamans@mtc.ca.gov](mailto:jyeamans@mtc.ca.gov). Those unable to participate in the meeting in person are invited to contact Jennifer directly to offer responses to the questions below. Light refreshments will be provided at the meeting.

### **Discussion Guide**

The discussion will focus on four main topic areas, as follows.

#### **1. Application and Project Selection Process**

- a. What went well, and what challenges were encountered?
- b. How should the application change in the next call for projects?
- c. How effective were the project evaluation criteria in selecting projects that best met program goals? Should the criteria change for the next round?
- d. Should anything else about the project selection process change for the next round?
- e. How did you address project eligibility? Besides transit pass subsidy projects, did you have any issues with project eligibility? If so, what were they? How could this be improved in the next funding cycle?

#### **2. Program Administration and Interagency Coordination**

- a. What has worked well with the Lifeline administration process, and what challenges have been encountered?
- b. What changes would you make within your county to improve administration of the Lifeline Program?
- c. What changes should be made at the regional level (MTC)?

### **3. Funding and Project Delivery**

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- a. Given the constraints associated with each funding source, how could the program be administered more effectively or efficiently?
- b. How do you balance requests for capital and operating projects? How should funds be allocated between the two?

### **4. Project Oversight**

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- a. What should be changed about project oversight requirements for the next round?

### **Other Information**

Materials relevant to the discussion which will be provided at the meeting include copies of the Lifeline Transportation Program guidelines adopted by the Commission as well as MTC's call for projects consisting of program information, project application, and scoring criteria. These will also be emailed in advance of the meeting for your convenient reference.

In addition to the information shared at this meeting, MTC will also be soliciting feedback involving more specific types of program information in the form of a questionnaire. Details regarding the questionnaire and what it will cover will be provided at the November 13 meeting.



## Appendix F: Project Sponsor Survey Results

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### About the Survey

The survey for Lifeline project sponsors was deployed online at SurveyMonkey.com on December 10, 2007. Email invitations were sent to sponsor contacts for all 39 Lifeline projects, with follow-up phone calls made in the case of invalid or returned emails. Sponsors with more than one project were asked to complete one survey for each project. Two reminder emails were sent out to all project contacts before the survey closed on December 21, 2007. Managers of 29 projects responded to the survey by the close date, a response rate of 74%. The survey instrument is attached following the summary.

### Data Summary

Findings from the survey are summarized as follows:

- 62% of respondents' projects have been implemented.
- Of the 29 responding project sponsors, 14 were transit agencies, 6 were non-profits/CBOs, 3 were cities, and 2 each were county social service agencies, other county agencies, and other local agencies.
- 14 of the 29 projects did not exist prior to the Lifeline program. Existing projects were previously funded (wholly or in part) mostly by "local transportation funds" such as county sales taxes, TDA funds, etc. (8 projects), "other" funds (7 projects), and MTC's LIFT program (6 projects). 5 projects were previously funded by STA, 5 by farebox revenue, and 4 by JARC. Other prior funding sources cited included private or non-profit grants and donations, county social service funds, federal non-DOT funds, and other federal DOT/FTA funds.
- Of the responding projects, 48% were operating projects, 28% capital projects, and 24% programs.
- Of the 7 capital projects, 4 (57%) were to be carried out in conjunction with other capital projects that target safety or mobility improvements for low-income persons.
- Of the 22 operating projects and programs, 15 projects (68%) will probably continue after this funding cycle only if the Lifeline program continues to fund them. 1 will likely be terminated (5%), 2 will probably continue with different funding (9%), and 4 will probably continue but with reduced scope or service (18%).
- 46% of projects involved meetings with other public agencies or transit operators as part of their development, 79% involved meetings with community-based stakeholders, and 32% involved outreach to traditionally underrepresented stakeholders.
- 57% of project sponsors participated in a Community Based Transportation Plan to develop their Lifeline project.

- When asked to rate the degree to which projects met various Lifeline program goals on a scale of 1 (not at all) to 5 (very much so), respondents reported the following:

Program Goal	Percent Reporting “5”	Percent Reporting “4” or “5”	Average Rating	Standard Deviation
Project developed through a collaborative and inclusive process	68%	86%	4.5	1.0
Project addresses transportation gaps in MTC-designated communities of concern through locally based needs assessment	75%	82%	4.7	0.9
Project improves a range of transportation choices for low-income people with new or expanded services	71%	82%	4.5	1.0

- Respondents rated the assistance they received from MTC in negotiating the various steps of project development and delivery on a scale of 1 (very poor/ineffective) to 5 (excellent/very effective) as follows:

Steps of Project Development and Delivery	Percent Rating MTC “5”	Percent Rating MTC “4” or “5”	Average Rating	Standard Deviation
Application/call for projects	19%	67%	3.9	0.7
Fund matching/swapping/ eligibility	20%	60%	3.8	0.8
Receiving funds (contracts and invoicing)	26%	43%	3.2	1.4
Understanding project delivery and monitoring requirements	23%	58%	3.7	1.0
MTC staff responsiveness in general	37%	70%	4.0	1.0

*Note: Percentages and averages exclude “N/A or don’t know” responses.*

- Respondents rated the assistance they received from their CMA/County program administrators in negotiating the various steps of project development and delivery on a scale of 1 (very poor/ineffective) to 5 (excellent/very effective) as follows:

Steps of Project Development and Delivery	Percent Rating CMA “5”	Percent Rating CMA “4” or “5”	Average Rating	Standard Deviation
Application/call for projects	41%	78%	4.1	0.9
Fund matching/swapping/ eligibility	23%	73%	3.9	0.8
Receiving funds (contracts and invoicing)	18%	65%	3.6	1.1
Understanding project delivery and monitoring requirements	16%	52%	3.4	1.0
CMA staff responsiveness in general	30%	70%	3.9	1.0

*Note: Percentages and averages exclude “N/A or don’t know” responses.*

- Respondents rated the following processes in implementing their projects on a scale of 1 (very difficult or very ineffective) to 5 (very easy or very effective) as follows:

Project implementation processes	Percent Rating Process “5”	Percent Rating Process “4” or “5”	Average Rating	Standard Deviation
Ease of receiving matching funds	33%	47%	3.7	1.2
Coordination and communication with funding agency/agencies	30%	61%	3.8	1.0
Coordination and communication with co-sponsors/partner agencies	32%	58%	3.8	1.1
Performance measuring/reporting/oversight	13%	53%	3.5	0.9
Clarity of program administration processes	16%	37%	3.4	1.0

*Note: Percentages and averages exclude “N/A or don’t know” responses.*

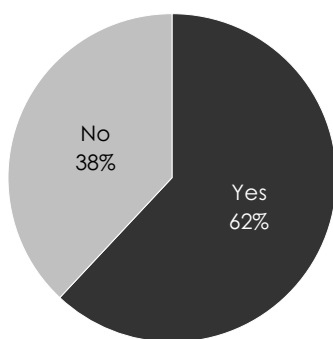
- 25% of respondents reported encountering some kind of difficulty or barrier during the application process.
- 44% of respondents reported encountering some kind of difficulty or barrier implementing their project since it was approved.
- 89% of respondents reported that it was “somewhat likely” or “very likely” they would apply for future Lifeline funding, with most saying it was “very likely.” 7% said it was “very unlikely” they would apply again, either because the funding source’s requirements didn’t match their objectives, or because the process was frustrating.
- 68% of respondents reported that within their agency/organization, their Lifeline project was either a “high priority” or a “highest priority” project. 18% said their Lifeline project was a “low priority” at their agency.

### Survey Results by Question

A question-by-question breakdown of responses follows:

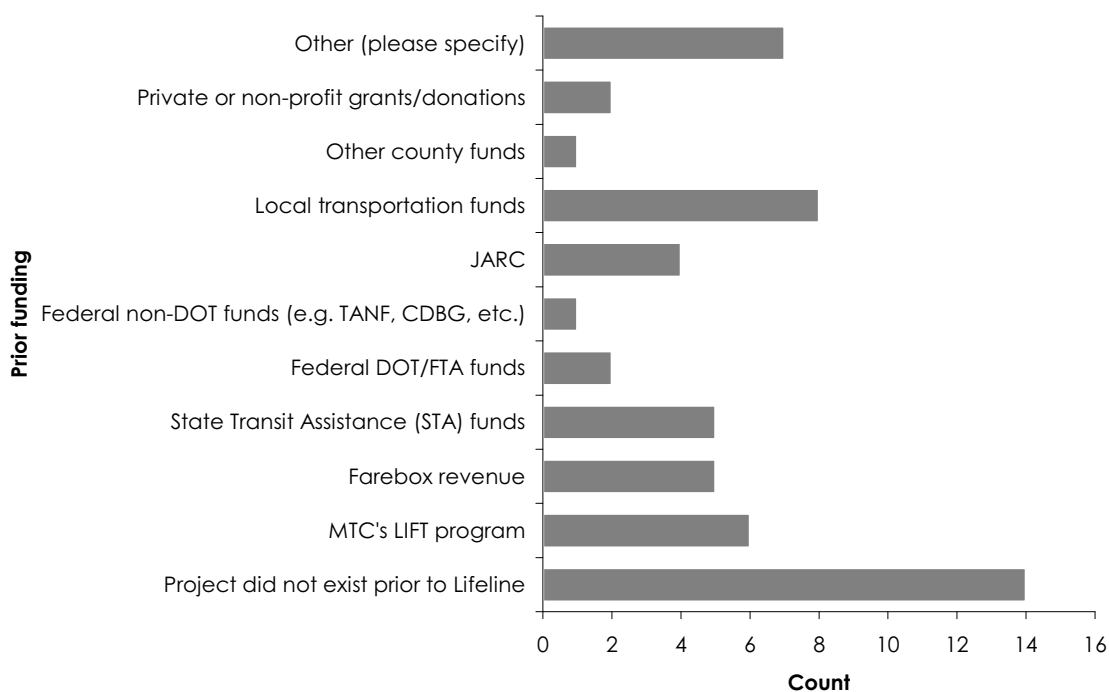
**Q1 and Q2 were basic project and sponsor information.**

**Q3. Has this project been implemented?**



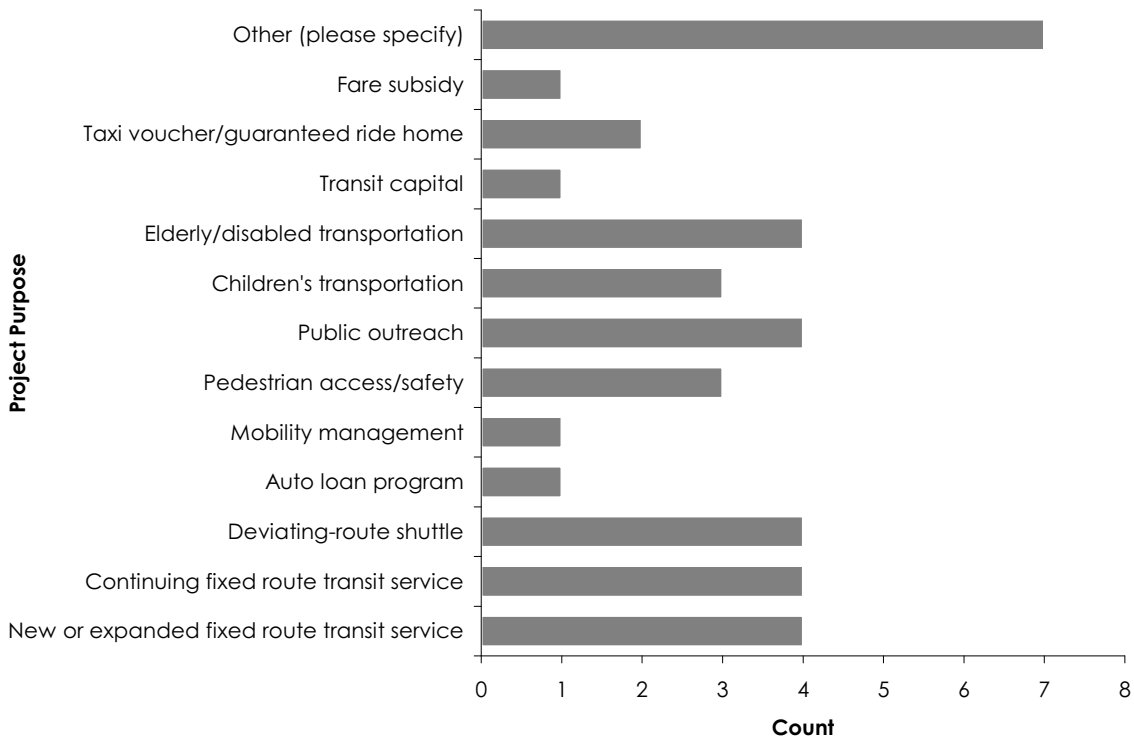
N=29

**Q4. If this project existed prior to the Lifeline program, please indicate its funding source(s) (check all that apply).**



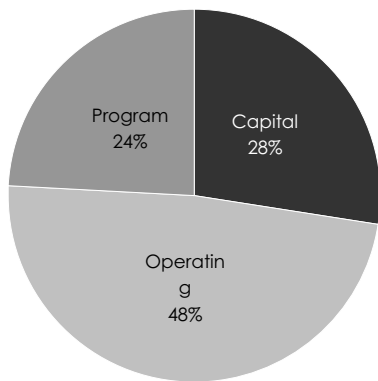
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**Q5. Which best describes the purpose of this project? (Check one or more)**



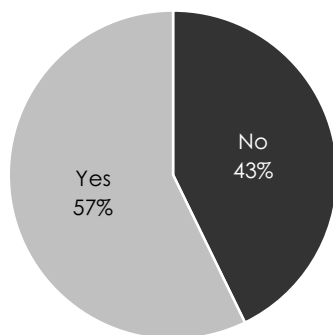
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**Q6. What kind of project is this?**



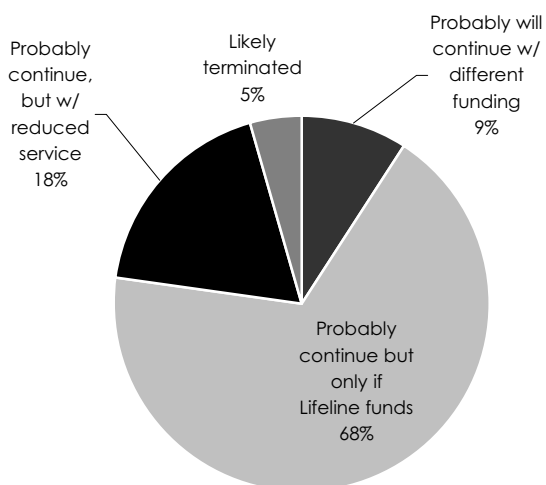
N=29

**Q7. (Asked of capital projects only) Will this project be carried out in conjunction with other capital projects that target safety or mobility improvements for low-income persons?**



N=7

**Q8. (Asked of operating projects/programs only) Please indicate the likelihood that the project will continue following this Lifeline funding cycle (FY05/06 - FY07/08).**

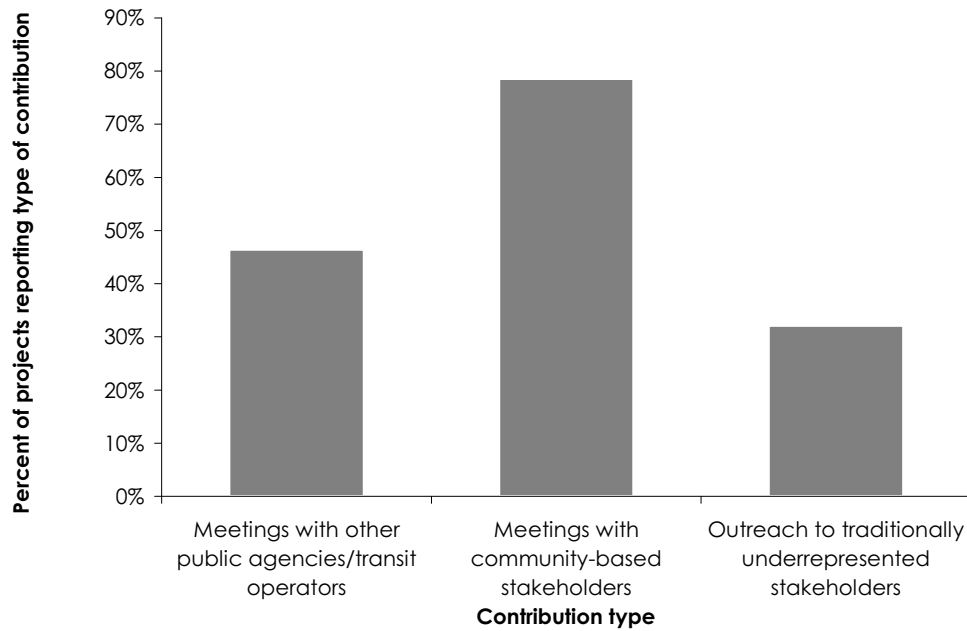


N=22

**Q9. When did/will service provided by your project under Lifeline funding end? (Please provide Month/Year)**

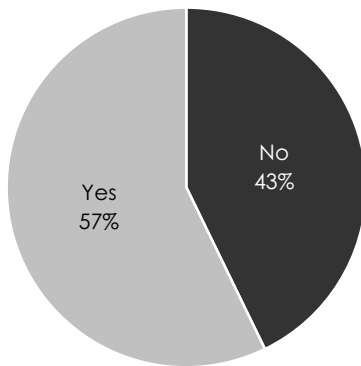
Responses ranged from March 2007 (soonest) to June 2011 (latest).

**Q10. Please indicate how other agencies/organizations/stakeholders contributed to the development of this Lifeline project.**



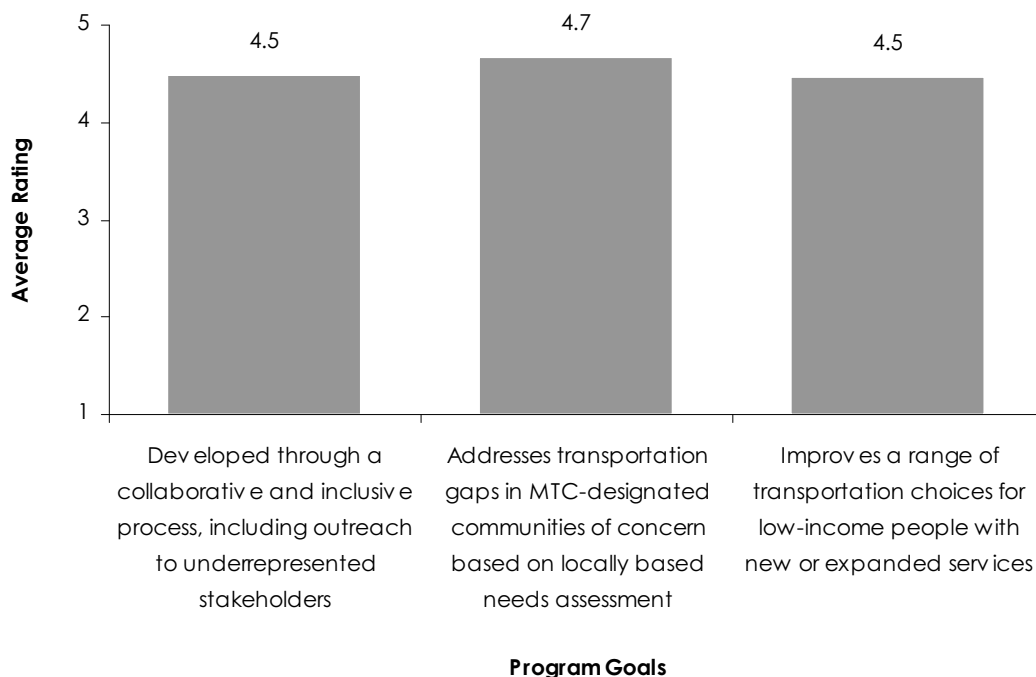
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**Q11. Did you or your agency/organization participate in a Community Based Transportation Planning process to develop this project?**



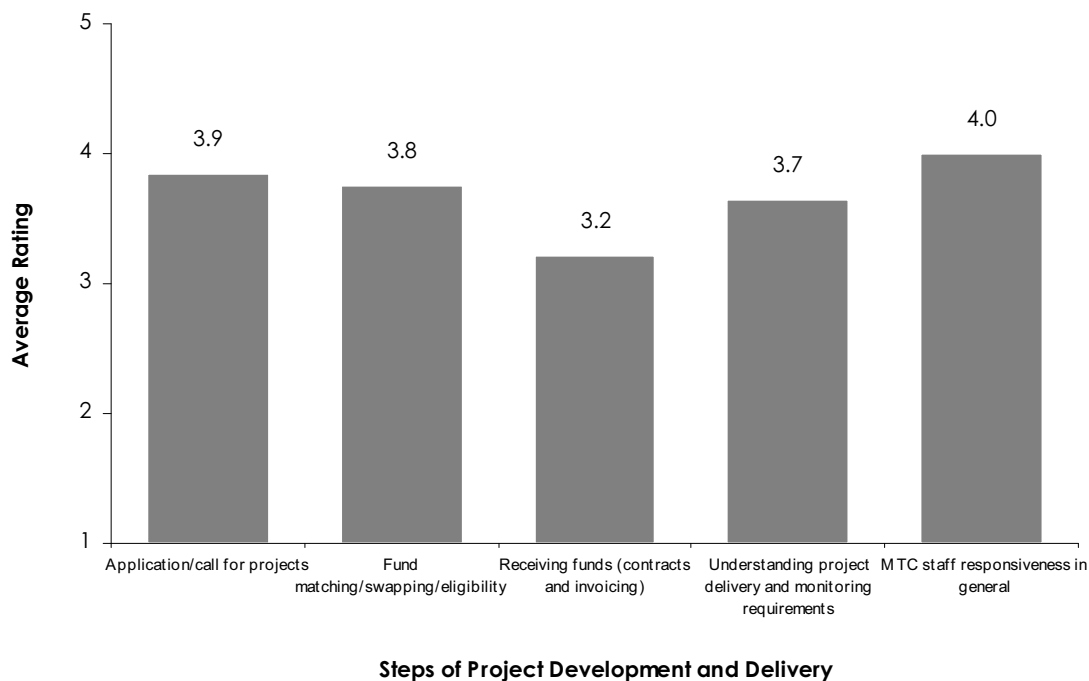
N=28

**Q12. Please indicate the degree to which this project meets the following Lifeline program goals (5 is highest):**



N=28

**Q13. How would you rate the assistance you received from MTC in negotiating the following steps of project development and delivery?**



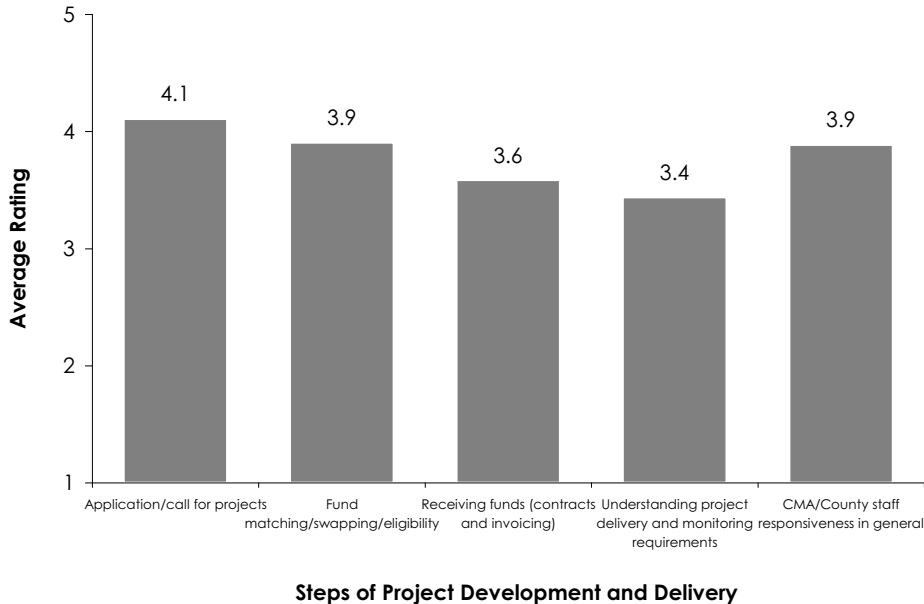
N=28



*If you rated any of the above a 1 or 2, please explain:*

- Time lapse between grant proposal due dates, the grant award notification and the actual contracts has been very slow.
- Was approved for funding over 18 months ago and have still not received a contract or any funding.
- It was be great for MTC to provide a visual timeline describing the process leading to the lifeline projects receiving funds from the federal government. It has been difficult to follow these regional and federal processes and update my director in terms of when the funds will be released and we can expect to implement the project.
- The program was notoriously slow in getting us the funding to begin. I was misinformed at one point that we were ready to start in April 2007, and we then had to get MTC to agree to retroactively reimburse us once the funding agreement was signed.
- It's been over a year and we still don't have the Route 376 contract. The other was slow coming as well.
- Not sure of the invoicing procedure. The project started about 4 weeks ago. How do I submit an invoice and also note in-kind match?
- We have yet to receive the funds even though we have raised our portion of the matching funds. We have not received any help from MTC getting the funds and we weren't notified that we even were awarded a grant.
- This project was approved via our CMA. And, it received wide support. But, after approval, the process and, especially the timing for receiving contracts, funds, etc. was too long and unclear. Additionally, it seemed that MTC staff were surprised at what this project consisted of, almost as though it shouldn't have been a lifeline project in the first place. The fact that our project ended up funded with JARC funds with added reporting requirements that don't seem to match well to what the project accomplishes causes us to have second thoughts. Had we known what would be involved in the beginning, we probably would have passed on this program.

**Q14. How would you rate the assistance you received from the Lifeline program administrator(s) in your county (county congestion management agencies or other designated county agency) in negotiating the following steps of project development and delivery?**



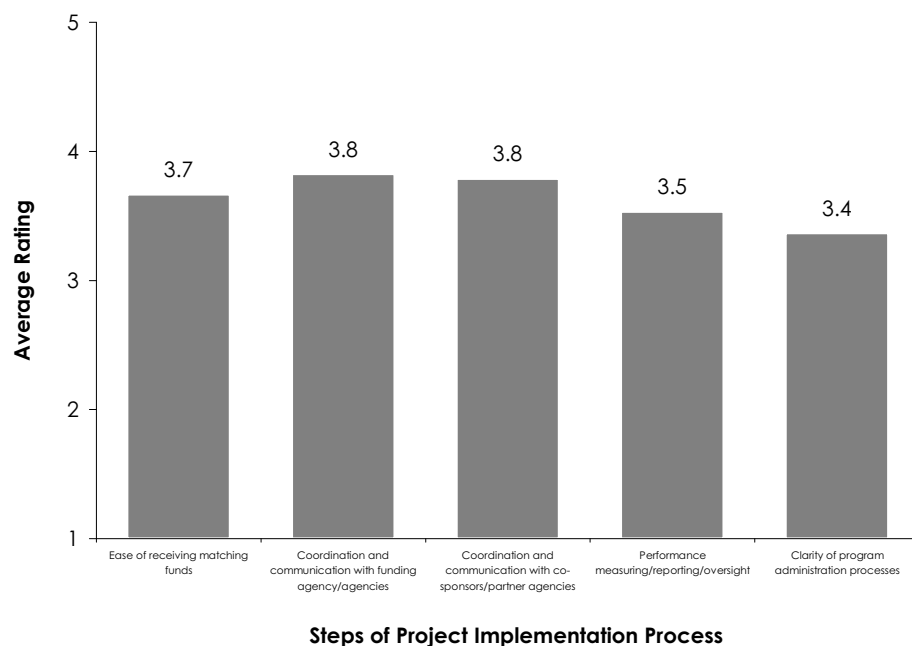
N=28

*If you rated any of the above a 1 or 2, please explain:*

- Was approved for funding over 18 months ago and have still not received a contract or any funding.
- The person who worked with the CMA on this project is no longer with the agency so I can't respond to this section.
- An original application for ARAP (Auto Repair Assistance Program) included the provision of monthly bus passes and was originally approved by the Joint Lifeline Transportation Committee in the amount of \$180,000. In the summer 2007, we received a letter from our local joint lifeline committee confirming this initial ok. However, in November 2007, we were informed via email and phone conversation that the transit passes were not an eligible expense and that we would need to reapply for funding. The issue is that the communication of this grant eligibility change was done in an informal manner, in contrast with the letter sent by the joint lifeline transportation committee. Although the auto repair component of the original proposal was eligible, the tone of the communication made it appear that the City would need to reapply under a different funding cycle. At the end, after some discussions, the emergency auto repair assistance program received a reduced amount and is awaiting funds to be released by the federal FTA.
- The requirements of the various sources of Lifeline funds wasn't clear. Which source (JARC, STA, CMAQ) was award drawn from?
- See previous question

- See #13.
- STA didn't give enough time and was not informative in advising how to claim the funds.
- Same answer as previous question

**Q15. Please rate the following processes associated with implementing your Lifeline project.**

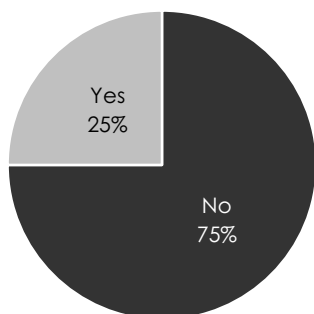


N=28

*Comments*

- Have not implemented the project as of this date.
- We have just submitted our first invoice, thus the first question is NA at this time, but so far I am very pleased with all coordination that has taken place.
- It seems to soon to respond to these.
- Project has not been implemented so these questions cannot be answered.
- Same answer as 13

**Q16. Did you encounter any difficulty or barriers during the program’s application process?**

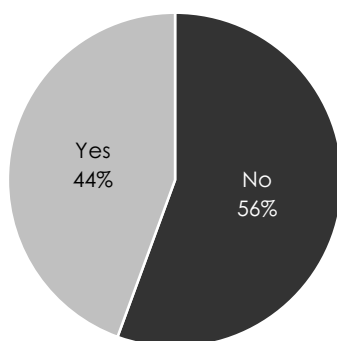


N=28

*Yes (Please explain)*

- The blended state and federal funding was a challenge but the MTA and MTC staff were very helpful in establishing a final contract.
- See answer to 14 above.
- The program application is based on residential poverty levels in project area. This project included low-income visitors to the project site - we included it, but it wasn't clear in the application how or where.
- MTC had to do a fund “swap” but it was handled very well and was “seamless” to us (the project manager).
- STA didn't give enough time and was not informative in advising how to claim the funds.
- Understanding how this program was suppose to work.
- The time between call for projects, finalizations and submission deadlines was too tight - not based on the plan, but based on what actually ended up occurring.

**Q17. Have you encountered any difficulty or barriers implementing your project since it was approved?**

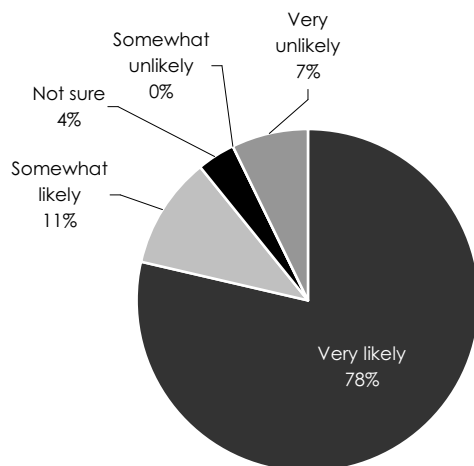


N=28

*Yes (Please explain)*

- Time lapse between the grant proposal due dates, award announcements and development of contracts has been very slow.
- Its taken months to get an MOU to pass-through funds to the project sponsors
- Was approved for funding over 18 months ago and have still not received a contract or any funding.
- Finding the appropriate person to coordinate the program. (This person has now been found and hired.)
- Project has not been approved due to delay in release of funds.
- We are still working on the most effective recruitment process
- See above concerns about how long it took to get the funding implemented.
- Because of communication after project award and the timing to get the contracts, there was a delay in being able to expend funds.
- School district delay in getting database administrator to query to get names of eligible students.
- I have had a number of vehicles donated to the agency and I have SMOGGED them and given them away to low-income recipients. But I am now almost out of funds and I can't afford to do anymore without the grant money.

**Q18. At this point in time, how likely do you think it is that your agency/organization would apply for future Lifeline funding?**



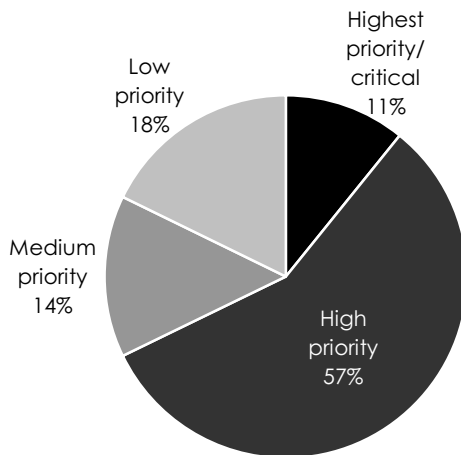
N=28

*If “very unlikely,” please explain:*

- Our experience has been frustrating at best. We are almost into the second year of the grant and we haven't received anything yet.
- We have always avoided JARC, Lifeline and other funding programs that have a limited lifespan for demonstration projects. We don't want to roll out service and then take it away when the funds run out. We believe in longer range, operational planning and the benefits to our constituency that such programs provide.

**Q19. Please describe what level of priority your agency/organization currently places on the Lifeline-funded project.**

- For transit agencies, please compare the Lifeline-funded project to all routes that your agency operates.
- For social service agencies and other government- and community-based programs, please compare the Lifeline-funded project to all programs that your agency/organization administers.
- For local public works agencies, please compare the Lifeline-funded project to all local public works projects in your CIP.



N=28

**Q20. Please provide comments, suggestions, or other feedback on MTC's and the counties' administration of the Lifeline program:**

- Was approved for funding over 18 months ago and have still not received a contract or any funding.
- None right now.
- Keep it simple, and if possible combine grant applications, monitoring and auditing with other funding sources.
- 1. Increase the funding 2. Compile the various CBTP recommendations - and fund common recommendations. 3. Insist that CBTP recommendations are high-priority for CMA funding in Countywide Plans, RTP and any other Calls for Projects. 4. Require cities and CMAs to report on CBTP implementation progress.
- We are new to this process and don't have comments yet
- It has been a very distant process for us, since we have to rely on state funds, federal funds, and then administered by the local Transportation Authority.
- Too much competition for too little money
- In the past we had received a significant level of JARC funds through earmarks to support our \$7.5 million annual funding gap. We need to seek new funding to help backfill this shortfall. Lifeline funds are a critical element of backfilling this need. More emphasis should be given to address existing transit operator needs rather than supporting

new - specialized - services that often create a demand that may not exist prior to the availability of funding. Also, any specialized services should coordinate with transit operators by way of a letter of support acknowledging that the transit operator is not currently or is not likely to provide the service in the future.

- What administration? We need help in getting the process to work for us. There is virtually no communication as to what to expect or when the funds will be available or for that matter, that we were awarded the grant.
- For some of the programs the match is difficult to achieve since for the most part these are new programs and funding locally is already committed.

**Q21. Please describe any changes you would like to see made to the Lifeline Transportation Program.**

- See comments from line 20
- The Lifeline program places too much emphasis on the specific needs in low-income/minority communities and not on what is needed to provide a more effective transit system on the whole. Given that well over half of Santa Rosa CityBus' patrons are transit dependent, we consider service provided throughout our system as "lifeline service." Due to the political nature of this program, we are forced to compete for this funding to implement service that has been identified in the Roseland CBTP as something necessary for filling a transportation gap. We are grateful for this funding. However, when the funding runs out, we will most likely need to continue the service at the expense of service provided elsewhere in our service area. This may compromise the effectiveness of our overall system over the long term, especially as operating costs continue to escalate and our primary sources of operating funds from the State are threatened. In general, it would help if the program were less restrictive and allowed us more latitude in terms of creating a more effective transit system overall that would better meet the needs of our transit-dependent patrons and encourage more discretionary riders to take public transit. That way, we are implementing service that makes sense over the long-term and will provide other benefits like an improved farebox recovery ratio and increased ridership.
- We to receive funds for the first time, thus I have no suggestions for improvements at this time.
- Please streamline the actual funding process by knowing whose budget these project will be funded through.
- None right now.
- Given the large amount of money available for lifeline in the future I would like to see a significant portion of it come to transit agencies on formula.
- Transit should get Lifeline off the top, or as a set-aside. The main CBTP recommendations, and the Lifeline transit service criteria, require funding to meet the service levels. The relationships of transit agencies, CBTPs, Lifeline, local govt and CMAs are not clear. If no one in the local govt. presses for CBTP implementation, it'll never happen.
- We are new to this process and don't have comments yet
- Formula shares to transit operators of STA share, reserve JARC for demonstration projects, provide funding that is sustainable

- A certain percentage of funds should be reserved exclusively for transit properties and transit properties should be able to compete equally with all funds available. One way of achieving this is to make STA an exclusive fund source for transit agencies.
- MTC administering the program vs. the CMA's
- One agency managing this program - not the CMA's
- Much better communication and awarding of funds as specified in the application process.
- The whole definition and standards for what constitutes Lifeline services need to be revisited and revised such that this is not limited to specialty, short range demo projects. The definition should go back to the original intent of basic and consistent backbone service with stable funding that can keep it operational for the long range.

**Q22. Please describe one or more best practices your organization has identified in developing or carrying out your project under the Lifeline program. A best practice is any action you have taken that you believe would be helpful or of interest to other agencies in developing or implementing Lifeline projects.**

- I think maintaining a great line of communication with both MTC and regional transportation entities is fundamental in carrying out our project.
- None right now.
- We have hired an Spanish speaking intern whose sole job is to outreach to the Spanish speaking community in our service area.
- This project is a destination TOD. Rather than small streetscape investments, unsustainable shuttles, or expensive transit service, a TOD will create jobs, fill a hole in the urban fabric, and provide services to the community.
- We are still working on this
- Become actively involved in the community served, educate them about how transit works, allow them to assist in planning, make them "own" the service's success
- Make friends with your activists, listen, be open to creative solutions, be ready to educate the community about how transit works & is funded.
- Our Admin Analyst/Office Manager set up a new Access database to track all of the intake survey and follow up survey data.
- We work with the Employment Relation Specialists to get referrals of clients who need vehicles to become self-sufficient. We are listed in the national data base and because we don't sell the vehicles it has caused us to get more vehicles.
- Our work with the community groups on a broad range of issues that helped to support this Lifeline project taught us a lot about the expectations and understandings of transit dependent individuals.



## Welcome

Thank you for completing this survey for the Interim Lifeline Transportation Program evaluation. Your feedback is very valuable as we strive to improve the program for future funding cycles.

The survey is designed to take approximately 10-15 minutes to complete. Note that most questions (marked with an asterisk) are required to have a response.

Each time you click the "NEXT" button at the bottom of each page, your progress is saved. If you must exit the survey midway through, you may return to your last saved point by re-entering this URL, which is the same as the one you received in your email: [http://www.surveymonkey.com/s.aspx?sm=NoUbOvyOye88NEvoVxLB\\_2bg\\_3d\\_3d](http://www.surveymonkey.com/s.aspx?sm=NoUbOvyOye88NEvoVxLB_2bg_3d_3d)

Please note that if you walk away from an incomplete survey page for more than 15-30 minutes, the server may time out on you, and you may lose your unsaved responses on that page when you click the "Next" button.

If you have any questions or comments about this survey, please call Jennifer Yeamans at 510-817-5764, or email [jyeamans@mtc.ca.gov](mailto:jyeamans@mtc.ca.gov).

Please complete all five parts of this survey by Friday, December 21.

### \* 1. Please provide your contact information.

Name	<input type="text"/>
Position	<input type="text"/>
Agency/organization	<input type="text"/>
Email address	<input type="text"/>
Phone number	<input type="text"/>

## PART I. BASIC PROJECT INFORMATION

The following questions cover basic project information.

### \* 2. Please enter the name of your project.

### \* 3. Has this project been implemented?

☐ Yes

☐ No. (Please give your best estimate as to the month and year it will begin implementation)

**\* 4. If this project existed prior to the Lifeline program, please indicate its funding source(s) (check all that apply).**

- ☐ Project did not exist prior to Lifeline
- ☐ MTC's LIFT program
- ☐ Farebox revenue
- ☐ State Transit Assistance (STA) funds
- ☐ Federal DOT/FTA funds
- ☐ Federal non-DOT funds (e.g. TANF, CDBG, etc.)
- ☐ JARC
- ☐ Local transportation funds (county sales tax, Transportation Development Act, etc.)
- ☐ Other county funds (human service agency funds, etc.)
- ☐ Private or non-profit grants/donations
- ☐ Other (please specify)

**\* 5. Which best describes the purpose of this project? (Check one or more)**

- ☐ New or expanded fixed route transit service
- ☐ Continuing fixed route transit service
- ☐ Deviating-route shuttle
- ☐ Auto loan program
- ☐ Mobility management
- ☐ Pedestrian access/safety
- ☐ Public outreach
- ☐ Children's transportation
- ☐ Elderly/disabled transportation
- ☐ Transit capital
- ☐ Taxi voucher/guaranteed ride home
- ☐ Fare subsidy
- ☐ Other (please specify)

**\* 6. What kind of project is this?**

- ☐ Capital
- ☐ Operating
- ☐ Program

## II. QUESTIONS SPECIFICALLY FOR CAPITAL PROJECTS

This question is specific to capital projects funded by the Lifeline Program.

**\* 7. Will this project be carried out in conjunction with other capital projects that target safety or mobility improvements for low-income persons?**

☐ No

☐ Yes (Please explain briefly the nature of the other projects)

**PART II. QUESTIONS SPECIFICALLY FOR OPERATING PROJECTS/PROGRAMS**

The following questions are specific to operating projects or programs funded by the Lifeline program.

**\* 8. Please indicate the likelihood that the project will continue following this Lifeline funding cycle (FY05/06 - FY07/08).**

☐ Project will probably continue at Lifeline scope/levels of service, probably from a different funding source

☐ Project will probably continue at Lifeline scope/levels of service, but only if Lifeline continues to fund it

☐ Project will probably continue but with reduced scope/service

☐ Project will or is likely to be terminated (please explain)

**\* 9. When did/will service provided by your project under Lifeline funding end? (Please provide Month/Year)**

**PART III. PROJECT DEVELOPMENT/GOALS**

The following questions cover the project development process as they relate to the goals of the Lifeline Transportation Program.

**\* 10. Please indicate how other agencies/organizations/stakeholders contributed to the development of this Lifeline project.**

☐ Meetings were held with other public agencies/transit operators specifically to develop this Lifeline project.

☐ Meetings were held with community-based organizations and other community-based stakeholders specifically to develop this Lifeline project.

☐ Outreach was conducted to traditionally underrepresented stakeholders specifically in the development of this Lifeline project (please explain).

## MTC Lifeline Transportation Program Project Sponsor Survey

**\* 11. Did you or your agency/organization participate in a Community Based Transportation Planning process to develop this project? Information about MTC's Community Based Transportation Planning program is available at <http://www.mtc.ca.gov/planning/cbtp/> (copy and paste link into new window)**

☐ No.

☐ Yes. Which one(s)?

**\* 12. Please indicate the degree to which this project meets the following Lifeline program goals:**

	1 - Not at all	2 - Not very much	3 - Neutral	4 - Somewhat	5 - Very much so	Not sure/Don't know
Developed through a collaborative and inclusive process, including outreach to underrepresented stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Addresses transportation gaps in MTC-designated communities of concern based on locally based needs assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improves a range of transportation choices for low-income people with new or expanded services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## PART IV. PROGRAM ADMINISTRATION/IMPLEMENTATION

The following questions cover administration of the Lifeline program and project implementation. The Lifeline Transportation Program is administered jointly by MTC and the nine Bay Area county congestion management agencies (or other designated county agency).

**\* 13. How would you rate the assistance you received from MTC in negotiating the following steps of project development and delivery?**

	1 - Very poor/ineffective	2	3	4	5 - Excellent/very effective	N/A
Application/call for projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fund matching/swapping/eligibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving funds (contracts and invoicing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding project delivery and monitoring requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MTC staff responsiveness in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you rated any of the above a 1 or 2, please explain:

**\* 14. How would you rate the assistance you received from the Lifeline program administrator(s) in your county (county congestion management agencies or other designated county agency) in negotiating the following steps of project development and delivery?**

	1 - Very poor/ineffective	2	3	4	5 - Excellent/very effective	N/A
Application/call for projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fund matching/swapping/eligibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving funds (contracts and invoicing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding project delivery and monitoring requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CMA/County staff responsiveness in general	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you rated any of the above a 1 or 2, please explain:

**\* 15. Please rate the following processes associated with implementing your Lifeline project.**

	1 - Very difficult or very ineffective	2	3	4	5 - Very easy or very effective	N/A or don't know
Ease of receiving matching funds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordination and communication with funding agency/agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordination and communication with co-sponsors/partner agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance measuring/reporting/oversight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clarity of program administration processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

**\* 16. Did you encounter any difficulty or barriers during the program's application process?**

☐ No

☐ Yes (Please explain)

**\* 17. Have you encountered any difficulty or barriers implementing your project since it was approved?**

☐ No

☐ Yes (Please explain)

**\* 18. At this point in time, how likely do you think it is that your agency/organization would apply for future Lifeline funding?**

☐ Very likely

☐ Somewhat likely

☐ Not sure

☐ Somewhat unlikely

☐ Very unlikely (please explain)

## PART V. GENERAL QUESTIONS

The following questions are applicable to the Lifeline program in general.

**\* 19. Please describe what level of priority your agency/organization currently places on the Lifeline-funded project.**

**-- For transit agencies, please compare the Lifeline-funded project to all routes that your agency operates.**

**-- For social service agencies and other government- and community-based programs, please compare the Lifeline-funded project to all programs that your agency/organization administers.**

**-- For local public works agencies, please compare the Lifeline-funded project to all local public works projects in your CIP.**

- ☐ Highest priority/critical  
☐ High priority  
☐ Medium priority  
☐ Low priority  
☐ Don't know

**20. Please provide comments, suggestions, or other feedback on MTC's and the counties' administration of the Lifeline program:**

**21. Please describe any changes you would like to see made to the Lifeline Transportation Program.**

**22. Please describe one or more best practices your organization has identified in developing or carrying out your project under the Lifeline program. A best practice is any action you have taken that you believe would be helpful or of interest to other agencies in developing or implementing Lifeline projects.**

**\* 23. Would you be willing to participate in a small group discussion for Lifeline project sponsors in order to give more in-depth feedback to MTC regarding the administration of the Lifeline program?**

☐ Yes

☐ No



## Appendix G: Summary of Input from Other Program Stakeholders

This section summarizes input received from other Lifeline Program stakeholders, including transit operators, MTC’s Minority Citizens Advisory Committee, the Regional Welfare to Work Transportation Working Group, and Urban Habitat.

### Transit Operators Roundtable

On December 11, 2007, MTC held a roundtable discussion for interested transit agency staff to provide feedback on the Lifeline program for the evaluation. Announcements of the meeting were provided to the Partnership Transit Finance Working Group and the regional Transit Planning Working Group. The following individuals were in attendance at the roundtable:

Rebecca Arthur	San Mateo County Transit District (SamTrans)/Caltrain
Celinda Dahlgren	Central Contra Costa Transit Authority (County Connection)
Barbara Duffy	Livermore Amador Valley Transit Authority (LAVTA)
Tamara Edwards	Livermore Amador Valley Transit Authority (LAVTA)
Crystal Ford	City of Vallejo/Vallejo Transit
Corinne Goodwin	San Mateo County Transit District (SamTrans)
Deidre Heitman	Bay Area Rapid Transit District (BART)
Therese Knudsen	Metropolitan Transportation Commission
Tina Spencer	AC Transit
Jennifer Yeaman	Metropolitan Transportation Commission

### Summary of Input Received by Topic

#### *Program Application and Project Selection Process*

- Does formulizing STA money for transit operators make the sustainability criterion go away?
- Sustainability is the biggest issue because it puts operators in a bad position. CCCTA’s LIFT project successfully morphed into full-time operations, but not all projects can do this under Lifeline.
- Project readiness is an important criterion.
- Raise cap on project amount (this was done county by county).
- There is a finite number of Community Based Transportation Plans, but operators’ whole populations are “Lifeline.” Need flexibility to address needs/issues not addressed in CBTPs.
- MTC should move toward consolidated application and reporting for funds (e.g. once a year). Consolidated review, funding sources, and auditing for Lifeline, RM2, T-PLUS, TDA, STA, etc.

### *Funding Issues*

- Capital improvements need a lifespan of 15 years under the Prop 1B infrastructure bond requirements. Limits use for shelters, which also need maintenance. This lifespan was reduced for buses.
- Formulate STA money and give it to operators for ongoing projects (e.g. BART last-mile shuttles).
- Leave innovative projects to competitive funding cycle: three-year cycle is OK for demonstration programs.
- Use JARC for innovative projects.
- Prop 1B capital money: give to BART for capital in exchange for operating dollars?
- Need policy for preventive maintenance money.
- Tie vehicle purchases to operating projects.

### *Project Monitoring/Oversight*

- There are ways to monitor projects such that MTC could attach strings to Lifeline operating money.
- A formula would help demonstrate that service improvements are benefiting low-income people: service-hour increases are easy for operators to prove, and can show that it is truly added service, not taken away from somewhere else in a “re-shuffle.”
- For auditing, include baseline numbers up-front as part of application process so that operators don’t have to figure out changes after the fact (e.g. don’t ask at the end of the grant cycle how much ridership has increased if recipients didn’t know at the beginning to establish base ridership).

### *Program Administration and Interagency Coordination*

- CMAs’ administration of Lifeline program: congestion is not related to access (i.e. spatial and temporal gaps). Not part of their legislative mandate.
- Agency had concern at first about CMAs administering the program, and to some extent those concerns played out. Construction projects could have been funded by other programs; operating money is what’s hard to get.
- SamTrans has a good relationship with C/CAG in San Mateo County, because there’s no question of how and whether SamTrans can apply for funding.
- If transit operators were in charge of Lifeline funds, how would that look? How flexible can they be? Grants people are already swamped. Want to give non-profits a chance to compete.
- Administrative fees to do contracts.
- Want MTC to be responsible for administering and allocating funds, can have a regional perspective.
- Why separate RM2 All Nighter and Lifeline programs? If RM2 isn’t Lifeline, not sure what is.
- Roll Lifeline program and funds into something else.
- MTC administering the program would open the field to more innovative projects.
- Important to keep social service agencies, operators, program administrators, and everyone else working together.

### *General Program Feedback and Miscellaneous Issues*

- There is a lot of money here, give some by formula to operators, leave some for innovative projects.
- BART's gaps are last-mile gaps and affordability. For last-mile gaps, need a dedicated source of income, not pilot projects. For affordability issue, would be better to work with non-profits to give passes.
- There should be a regional fare reduction program so that no operator has to bear the brunt. TransLink via human service agencies?
- Low-income people aren't just in Communities of Concern, especially in outlying areas. Need to reach them as well.
- In Contra Costa County, creating an alliance among stakeholders and activists helped people understand that CCCTA was really trying to improve mobility. CCCTA was able to lead the discussion toward what was most cost-effective and reasonable. Need to educate people about where the money comes from, where the money goes, and what the various alternatives are from which to choose.
- In addition to CBTPs, need overall county-by-county mobility plans.
- Mobility management is a good approach, but need to start with a centralized repository of services.
- Operators are open to doing things a different way, but need to have staff to carry it out.
- Portland Ride Connection (<http://www.rideconnection.org>) is a good model for mobility management for elderly & disabled clients. The site documents estimated mobility options by zip code and by types of services provided (e.g. seniors, disabled, open to all).

### **Other Stakeholder Feedback**

In addition to transit operators, other stakeholders familiar with the mobility needs of the region's low-income population were consulted to provide input on the program's overall goals and administrative framework, including MTC's Minority Citizens Advisory Committee, the Regional Welfare to Work Transportation Working Group, and Urban Habitat.

The Regional Welfare to Work Transportation Working Group is a collaboration of staff from transit operators, social service agencies, congestion management agency staff, and others involved in helping welfare recipients transition to the workforce. This group formed in the late 1990s to aid the development of the Bay Area's nine county welfare-to-work transportation plans, as well as MTC's Regional Welfare to Work Transportation Plan, efforts which laid much of the groundwork for policies that guide the Lifeline program. MTC staff obtained feedback on the program at their regularly scheduled meeting on January 28, 2008.

Urban Habitat is a Bay Area social justice research and advocacy organization which, through its Transportation Program, works for improved transportation for low-income communities and communities of color. In addition, Urban Habitat staffs the Social Equity Caucus's regional Transportation Justice Working Group, which advocates for equality in transportation decision-making. Urban Habitat was involved in the 2001 Lifeline Transportation Network project and other Environmental Justice activities undertaken by MTC and its advisory committees. In addition, Urban Habitat has provided input on the development of the Community Based Transportation Planning program, and participated directly in three CBTPs in Alameda County.

Urban Habitat is also conducting an evaluation of the Lifeline program concurrent with MTC's administrative evaluation. MTC staff met with Urban Habitat staff January 16, 2008.

MTC's Minority Citizens Advisory Committee advises MTC on a variety of transportation issues and assists with outreach to low-income communities and communities of color throughout the region. In early 2008, MCAC formed an Environmental Justice/Lifeline Subcommittee, which held two meetings during the evaluation period. At a February 26, 2008, meeting, the subcommittee agreed with the initial evaluation findings and recommendations presented by staff, and also expressed the desire that Urban Habitat's eventual evaluation findings should also be incorporated into MTC's final recommendation for the future Lifeline program's administration.

The following table summarizes the feedback received based on discussion questions posed by MTC staff:

Questions Posed by MTC Staff	Comments from Regional Welfare to Work Group	Comments from Urban Habitat
1. Do you feel the 39 projects comprising the Interim Lifeline Program are consistent with the program's goals as outlined in the Program Guidelines?	<ul style="list-style-type: none"> <li>• Selection process should change: goals should be more fine-tuned for future funding sources</li> <li>• Different project measurements for different kinds of projects.</li> <li>• Change guidelines and criteria to create more diverse projects; a lot of money in Contra Costa went to a single transit project.</li> </ul>	<ul style="list-style-type: none"> <li>• Haven't been involved in the development of most projects, most appear to fill gaps. However, there is concern about meaningful outreach and participation for projects such as the Ed Roberts funding.</li> </ul>
2. Are the Lifeline program's goals adequate or should they be changed?	<ul style="list-style-type: none"> <li>• Examine whether the program can be designed to make for more effective projects.</li> <li>• Be more prescriptive</li> <li>• Encourage more creativity</li> <li>• Specify rail transit as a kind of fixed-route transit (goal 3)</li> </ul>	<ul style="list-style-type: none"> <li>• Overall OK, but not specific enough in terms of how it's going to get done.</li> </ul>
3. Do you have any feedback on the project development and selection process in any or all of the nine Bay Area counties, or MTC's role in conducting program outreach and validating the selected projects?	<ul style="list-style-type: none"> <li>• MTC should do some kind of "reconciling" to deal with region-wide issues.</li> <li>• Impossible to remove politics completely from the process</li> <li>• A project sponsor needs to be available at the county/local level, but this doesn't always happen</li> <li>• Have guidelines specify an "if/then" process for advancing projects.</li> <li>• It takes longer than the call for projects window to build relationships with appropriate sponsors (working with transit agencies, counties, etc.)</li> <li>• Make guidelines more specific; get expectations in line with what the money can actually do</li> </ul>	<ul style="list-style-type: none"> <li>• Project readiness seems to outweigh greatest transportation need; community need and filling gaps should be highest priority.</li> <li>• Ranking in CBTPs appears to be problematic; weighting is key.</li> <li>• Given the way the call for projects works, projects that don't have a sponsor don't have a chance.</li> </ul>

Questions Posed by MTC Staff	Comments from Regional Welfare to Work Group	Comments from Urban Habitat
<p>4. Do you have any feedback regarding the program's current administration at the county level?</p>	<ul style="list-style-type: none"> <li>• Solano Transportation Authority wants to continue to enable locally based projects.</li> <li>• Why not have local and regional programs as with TLC and Regional Bike/Ped (not sure if this has a local program component).</li> <li>• Keep money by county but have MTC administer it — CCTA didn't seem to know much about this program the first time around.</li> <li>• County-level needs seem to work well with small projects where some needs are very pressing and locally based project impact can be very effective.</li> <li>• Nothing is worse than engaging a community in a local planning process and then not delivering on projects; the fact is there is not enough money to go around.</li> <li>• Coordinate projects with MTC's Transit Connectivity Plans and projects</li> <li>• Look at Coordinated Plan: human service agency money is not conditional on dealing with transit and other transportation providers.</li> <li>• Consider mobility management strategies at the county/sub-regional level. Something like 511 that encompasses very locally based services.</li> <li>• How to retain small/low-dollar-amount projects from CBOs?</li> </ul>	<ul style="list-style-type: none"> <li>• Better to have two different programs with clearer goals. A "local" CBTP-based program to fill identified gaps such as local infrastructure, and an MTC-based regional program to fill spatial/temporal gaps in Lifeline network.</li> <li>• Not convinced of level of commitment in some CMAs: ACCMA in particular, although can't speak to other counties.</li> <li>• MTC should monitor the program more closely.</li> </ul>
<p>5. Do you have any opinion about how the funds that have been committed to the program should be allocated, given the constraints of each source?</p>	<ul style="list-style-type: none"> <li>• Complicated to get money in the right "bucket"</li> <li>• Should be sub-programs for certain fund sources (JARC, 1B)</li> <li>• Fund swapping: Make it clearer how this happens and why</li> <li>• Be very clear about what's different next time around. Do more to streamline expectations and process up-front</li> <li>• Look at funding sources outside government, such as private foundations.</li> <li>• Tap into Health &amp; Human Services funding sources; get more people around the table</li> <li>• Would like to see a cap on project size, set aside some money for small and innovative projects</li> <li>• Make clear what non-profits need to do in order to get STA and other funds.</li> </ul>	<ul style="list-style-type: none"> <li>• Counties should do all they can to be swapping for more flexible money. More flexible funding sources should go to counties that have less flexibility (those that do not have local transportation sales tax funds, for example).</li> </ul>

Questions Posed by MTC Staff	Comments from Regional Welfare to Work Group	Comments from Urban Habitat
6. What kinds of measures of success do you think should be used for the Lifeline program?	<ul style="list-style-type: none"> <li>How often are plans being updated (Lifeline Network, CBTPs), and can progress be measured over time?</li> <li>Each project has different monitoring plans</li> <li>Satisfaction with plans/projects?</li> <li>Do people have better mobility choices? Alameda is tracking this annually.</li> <li>Each county should do some qualitative evaluation of all the projects together to assess how they meet local needs, non-traditional as well as fixed-route services</li> <li>Should look at quantitative performance measures, not qualitative.</li> </ul>	<ul style="list-style-type: none"> <li>Use some kind of benchmarking to demonstrate what percentage of identified gaps have been filled.</li> </ul>
7. What changes do you think could be made to the program to better benefit the Bay Area's low-income residents?	<ul style="list-style-type: none"> <li>How to retain small/low-dollar-amount projects from CBOs?</li> </ul>	<ul style="list-style-type: none"> <li>Don't emphasize project readiness as much.</li> </ul>
8. Should the definition of the Bay Area "Lifeline" population be refined or changed, and if so how?		<ul style="list-style-type: none"> <li>No change needed.</li> </ul>
9. How do you want the findings from this evaluation to be used?	<ul style="list-style-type: none"> <li>Refer to other responses</li> </ul>	<ul style="list-style-type: none"> <li>Lead to updating of the Lifeline Transportation Network</li> <li>Establish benchmarks for service and demonstrate progress over time.</li> </ul>
10. Do you have any other feedback you feel would be helpful for this evaluation?	<ul style="list-style-type: none"> <li>Examine projects that were submitted but not funded</li> <li>Predictability of service/funding is important, no matter what kind of service/provider.</li> <li>No regional mechanism for BART-wide programs (e.g.); would need to go county to county and hope that every county approved the project.: have a per-county apportionment and a regional apportionment.</li> <li>Welfare to work plans are becoming outdated.</li> </ul>	<ul style="list-style-type: none"> <li>Public participation strategies for CMAs/CBTPs should be addressed.</li> <li>Lifeline funding must be sustainable/ ongoing for Lifeline transit operations</li> <li>Make updating the "Lifeline network" a regular part of the Lifeline program: update every 3–4 years as with the RTP. Find out what it costs to close the gaps.</li> <li>Total up CBTP projects and examine costs</li> <li>What can be done to provide technical assistance to CMAs to make the funding work better?</li> <li>Getting at affordability and quality of service: Consider 3 programs: <ol style="list-style-type: none"> <li>Addressing spatial/temporal gaps</li> <li>Infrastructure programs for local improvements like sidewalks</li> <li>Addressing region-wide issues like affordability.</li> </ol> </li> </ul>